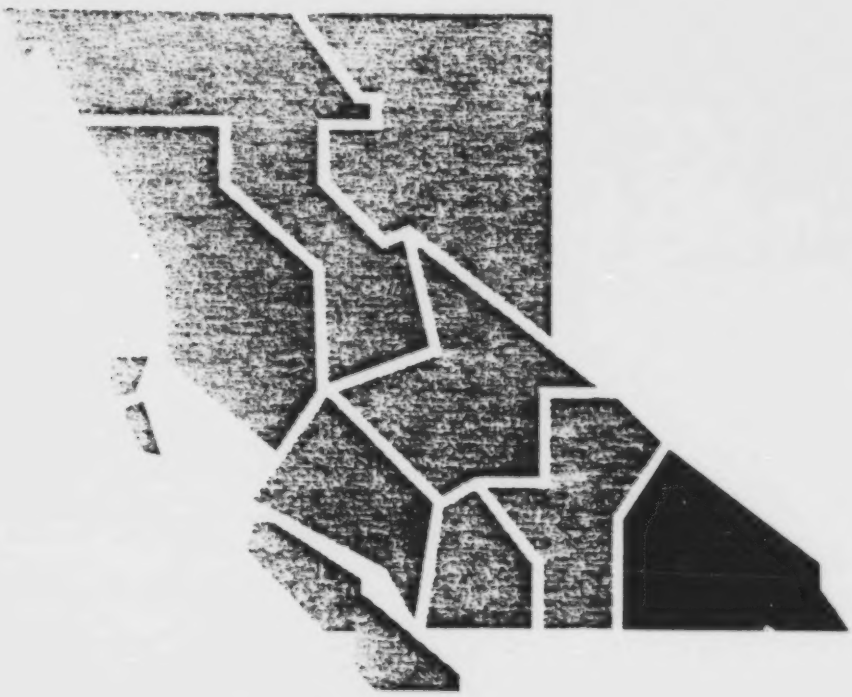
KOOTENAY DEVELOPMENT REGION

TOURISM DEVELOPMENT OPPORTUNITIES STRATEGY

SUMMARY REPORT



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Task Force on Parks, Recreation and Tourism
Kootenay Development Region

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PART I

Background

1.0 INTRODUCTION

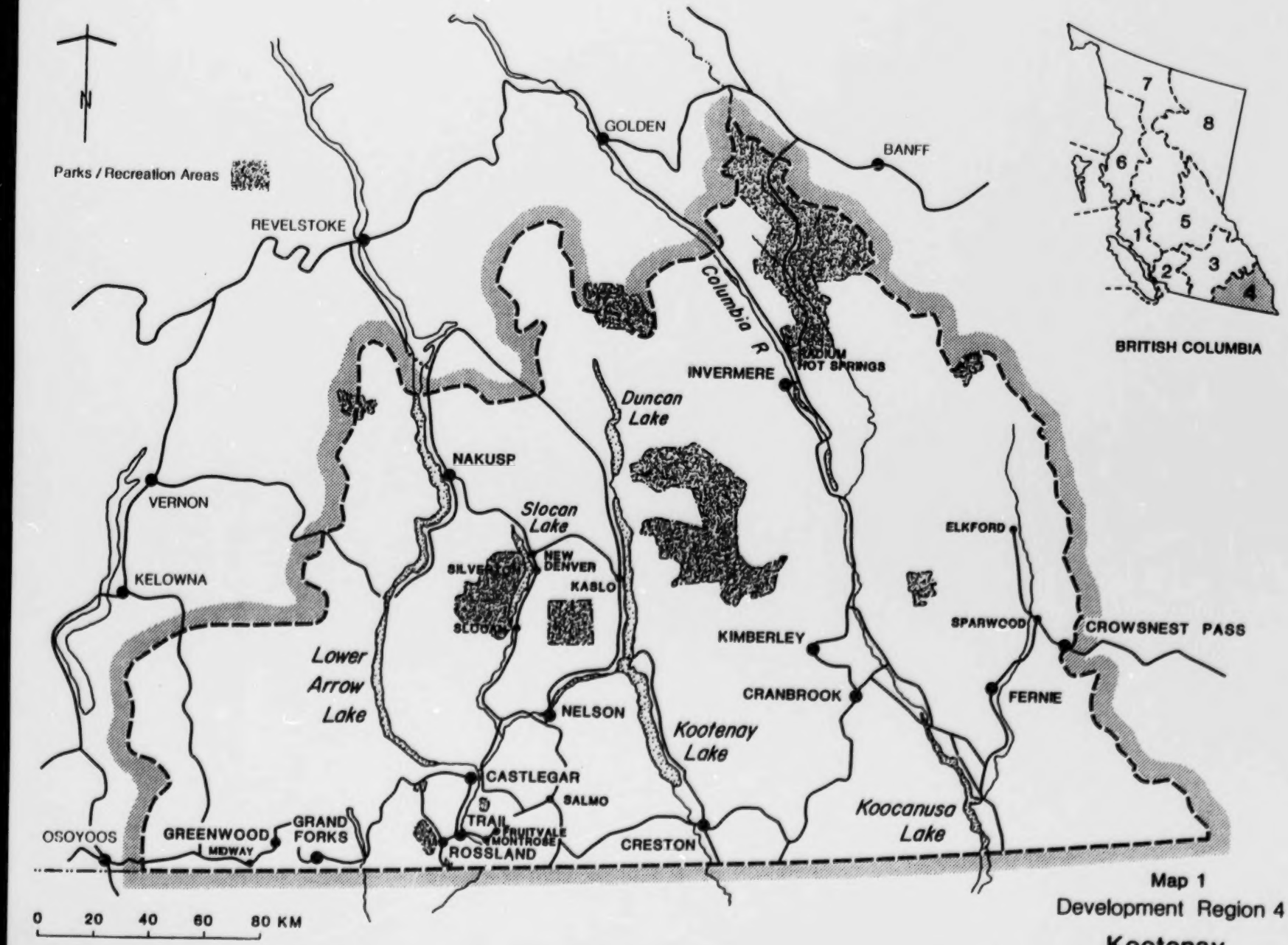
The Kootenay Development Region (map 1) encompasses tourism products ranging from deluxe destination resorts to casual touring opportunities. The resource base for tourism development is rich and diverse, encompassing:

- remote wilderness mountain ranges;
- lake and river systems and hot springs;
- scenic beauty;
- extensive heritage resources;
- prehistoric and historic mining resources;
- network of interesting communities.

The region's array of natural and historic resources has become its principal source of tourist drawing power. The importance of the tourism sector to the region is reflected in the considerable interest expressed by the private sector and by communities in tourism related developments. In order to maximize the economic benefits from tourism, the region has responded positively to the Ministry of Tourism's suggestion for the preparation of a regional tourism development opportunities strategy. Supported by funding through the Ministry of Regional and Economic Development, the first step in the process is to prepare a draft tourism development opportunities strategy for review by stakeholders in the region. This includes the region's Task Force on Parks, Recreation and Tourism, associations and other interest groups, communities, tourism operators, and the public. The role of the Task Force has been central to the initiation of this opportunity strategy. The Task Force has been involved throughout its development and has provided valuable input to the recommendations and selection of priorities. It is also the Task Force which will carry forward the opportunity strategy towards implementation.

This tourism opportunities strategy presents the findings on:

- the region's tourism product;
- tourism markets;
- the institutional context for tourism development and marketing;
- a tourism development opportunities strategy for the region comprising recommended objectives, overall product development themes, and a product development approach;



Map 1

Development Region 4

Kootenay

- priority tourism development opportunities identified through the analysis in the report, input from the region's stakeholders, and public input from a series of seven open house/public meetings held in the area.

1.1 Methodology

The preparation of the tourism development opportunities strategy was based on the following data sources and analyses:

- extensive interviews throughout the region with stakeholders and interested groups;
- secondary research and review of tourism-related Kootenay documentation;
- tourism market data;
- workshop sessions with the Task Force on Parks, Recreation and Tourism;
- interviews with government agencies;
- seven open house/public meetings in communities throughout the region.

The analysis approach involved development of an understanding of the strengths and weaknesses of tourism in the Kootenay Development Region, identification of market opportunities in terms of both existing and potential markets, and selection of tourism development opportunities which will maximize the tourism development potential. Although the focus is on private sector opportunities, the institutional environment must be supportive of, and conducive to, private sector interests in tourism. Therefore, attention has been paid to the formulation of a strategy for the development opportunities.

Approximately half way through the study process, a series of open house/public meetings were held in communities throughout the region. The purpose of these sessions was to present preliminary conclusions on the framework for tourism development in the region and preliminary development opportunities. A questionnaire was distributed during the public meetings. Of about 360 attendees at the sessions, approximately 156 filled in and submitted the questionnaires for review by the study team.

Input from these public sessions was integrated with supporting tourism analysis by the study team to:

- classify the full range of tourism opportunities identified, into those of regional scope as compared to those which are more "local" in nature;
- undertake preliminary evaluation of regional tourism development priorities.

The preliminary evaluation by the study team was then reviewed by the Task Force on Parks, Recreation and Tourism in a workshop session. Consensus from this meeting was then used as the basis for developing descriptions of the top regional priorities for submission to government. Each regional development opportunity description includes recommendations on "action steps" to advance their implementation.

2.0 TOURISM PRODUCT ASSESSMENT

The Kootenay Development Region offers a wide range of tourism products. This diversity of products consists of accommodation facilities, major summer and winter recreation-based developments, tour operators offering single or multi-day tourism packages, museums and other attractions, and a host of recreational activities. These products are not only found in the several communities within the region, but also in the undeveloped wilderness areas. The products generally focus on the diversity of natural resources and the unique cultural and historical resources the region has to offer.

2.1 Natural Resources

2.1.1 Topography

The region is dominated by four mountain ranges: Rocky, Purcell, Selkirk and Monashee. The Rocky Mountains are noted for their rugged topography and development of facilities in this area is difficult and expensive. As a result, commercial recreation interest has focused on the Purcell, Selkirk and Monashee ranges. These mountain ranges are typified by landscapes of long and continuous slopes with flat ridgetops which provide for easier access than the Rocky Mountain ranges. The mountain ranges can be divided into alpine and sub-alpine areas which provide different tourism experiences.

Alpine areas are found throughout at the higher elevations providing for both summer and winter opportunities. In the summer the spectacular scenery and the potential to view wildlife make these areas popular. During winter the alpine regions offer excellent skiing opportunities from cross-country to cat-skiing.

The sub-alpine parkland areas of the region offer protection from the often harsh environment of the alpine areas. These areas mark the transition from the alpine regions to the sub-alpine forest areas. The trees are spaced apart and vegetation is less dense. These areas are popular for hiking, hunting and trail riding in the summer months and skiing in the winter months.

The sub-alpine forests occur at lower elevations. Vegetation is very dense in these areas. There are Douglas Fir, Ponderosa Pine and Cedar/Hemlock forest zones found throughout the region. Access routes into these forested areas are facilitated by other industries, such as logging and mining. Trail systems are provided by the many parks within the region. Base camp facilities are more often built within these forest zones due to ease of access and protection from the climate found in the higher elevations. Summer activities are popular in these forested zones. Winter activities require the development of trails or ski runs.

2.1.2 Lakes and Rivers

Separating each of the four mountain ranges are a series of water systems. In the western portion of the region is the Arrow Lake and Lower Columbia River, a water system regulated by B.C. Hydro. Kootenay Lake dominates the central portion of the region separating the Selkirk and Purcell Mountain ranges. Kootenay Lake and Slocan Lake flow into the Lower Kootenay River above Castlegar. In the eastern portion of the region is the Windermere Lake system and Lake Koocanusa which separates the Purcell and Rocky Mountain ranges. The Kootenay, Columbia and Windermere lake systems provide excellent recreation opportunities, offering warmer water temperatures in the summer than their higher altitude counterparts.

Of these lake systems the Kootenay, Slocan and Arrow Lakes are best suited for sport fishing and recreational boating opportunities. The water levels of the Arrow Lakes are regulated by B.C. Hydro. The lake is a storage reservoir and can undergo significant changes in water levels over a period of time. As a result, facilities require proper planning to accommodate the fluctuations in water levels. To date boating and fishing activities on Arrow Lake are primarily conducted by local residents as tourism activities have not developed extensively on the lake. On the other hand, recreational activities have developed on the Kootenay and Slocan Lakes which serve both the local resident and tourist to the region.

2.1.3 Parks

The region offers a wealth of parks for residents and visitors alike to experience the natural beauty and resources of the region. The park system is an important feature of the region's tourism product, serving to draw visitors to the region, particularly from nearby markets (e.g., Alberta, Washington).

National Parks

There is one National Park within the Kootenay Development Region. Kootenay National Park, which joins Banff and Yoho National Parks, attracts over 1.1 million visitors each year. One of the main attractions at the park is the Radium Hot Springs Aquacourt which attracted over 300,000 visitors in 1988. Exhibit 2.1 gives a more detailed breakdown of park attendance.

EXHIBIT 2.1: KOOTENAY NATIONAL PARK FACILITIES ATTENDANCE

	1987	1988	1989
Radium Hot Springs Aquacourt (person entries)	352,221	336,680	332,357
Information Centres Inquiries (contacts)	36,067	37,658	39,609
Campsite Nights Used	26,734	27,996	27,293
Vehicle Entries (all traffic north and south)	908,510	911,170	*1,792,000
Park Visits (person visits)	—	—	1,142,000
Visit Days	—	—	2,375,000

* This increase is attributed to the new counting method which more accurately reflects visitation to the park.
Source: Canada Parks Service, Kootenay National Park

Provincial Parks

In total there are 68 provincial Parks in the region (See Annex A for a detailed listing of the provincial parks). In 1989 these 68 parks attracted over 478,000 day use parties, down almost 20,000 from the previous year (Exhibit 2.2). Campground attendance, however, remained stable at approximately 77,000 parties for both 1987 and 1988.

EXHIBIT 2.2: PARK ATTENDANCE SUMMARY 1986, 1987 AND 1988

	1986	1987	1988
Campground Attendance (in parties)			
Western Portion	24,964	29,137	29,567
Eastern Portion	46,217	47,129	47,324
Day Use Attendance (in parties)			
Western Portion	256,886	255,340	249,260
Eastern Portion	227,246	242,871	229,165
Fort Steele Historic Park	77,615	*	*
Boating Attendance (in parties)			
Western Portion	7,574	1,304	1,338
Eastern Portion	24,386	*	*
Interpretation Attendance (in contacts)			
Western Portion	52,495	*	*
Eastern Portion	24,386	*	*

* No statistics are available
Source: Ministry of Parks, Park Data Handbook, 1986, 1987, 1988.

Park facilities, such as campsites, toilets, sani-stations, beaches and trails, are provided in many of the Provincial Parks. Exhibit 2.3 gives a breakdown of park facilities in the eastern and western areas of the region.

EXHIBIT 2.3: PROVINCIAL PARK FACILITIES INVENTORY, 1988, KOOTENAY DEVELOPMENT REGION

	Western Portion	Eastern Portion
Area in Hectares	155,527	212,719
Campsites:		
Single	477	536
Double	37	44
Undeveloped	58	220
Total	609	844
Sani-Stations	4	3
Shelters:		
Overnight	20	24
Day Use Area	2	2
Registration Shelters	42	36
Parking:		
Day Use Lots/Vehicle Cap.	33/1469	28/1824
Boat Launch Lots/Vehicle Cap.	11/342	13/283
Boat Ramps	13	14
Developed Beach in Metres	6391	4676
Roads:		
Paved (km)	19	17
Gravel (km)	33	40
Class 3 Roads (km)	0	5
Trails:		
Hiking Trails (km)	296	511
Ski Tour Trails (km)	35	22

Source: Ministry of Parks. Park Data Handbook, 1988.

Recreation Sites

In addition to the parks, there are numerous recreation sites maintained by the Forest Service. These sites provide the visitor with opportunities to travel along the main logging routes and stop for a picnic or

overnight stay. The sites offer minimal facilities, campsites, picnic benches and outhouses. The visitor to these areas is seeking more of a rustic camping experience.

Park Development

Within each of the park sites, trails and campsites have been developed and maintained by the responsible agency. Outside of each of the parks, further development of tourism facilities and services has occurred, although to varying levels. For some areas, such as Radium Hot Springs and Invermere, the development is extensive and for others, such as the Slocan Valley, the development is much more limited. In addition to the traditional development of accommodation and services offered outside the parks, the region is experiencing an increase in tour operators who are based outside of national or provincial park boundaries, but offer outdoor/recreation tours within the park. For some this has become fairly extensive, such as the heli-skiing operations, and for others, such as guide outfitters, activity is limited to trail riding, or hiking tours within the park.

2.2 Accommodation Facilities

Accommodation in the Kootenay Development Region varies widely; encompassing everything from small bed and breakfast facilities to large resort complexes. Several accommodation facilities offer both roofed accommodation and campground sites. Other facilities offer only rooms or campground sites. Information on the region's accommodation facilities has been compiled from the following documents:

- B.C. Accommodation Guide, 1990;
- B.C. Hotel Industry Study, 1988, Stevenson Kellogg Ernst & Whinney;
- B.C. Motel Industry Study, 1987, Economic Planning Group.

Although accommodation packages are offered in the Kootenays (mainly related to ski hills and golf course activities), most accommodation is sold on an individual room night basis.

2.2.1 Bed and Breakfasts

Bed and breakfast facilities can be found in most communities in the region. However, there is a concentration of these facilities in the Invermere area, and in the communities of Cranbrook and Nelson. Nelson especially appears to have organized its bed and breakfasts and distributes a listing of the facilities to increase traveller awareness of their availability. Altogether, there are approximately 18 bed and

breakfasts in the western and 10 in the eastern portions of the region respectively, each averaging 2-3 rooms each. The bed and breakfasts allow the visitor to the Kootenays to experience first hand the warm, friendly atmosphere of this region, as well as giving them an opportunity to stay in a Kootenay home.

2.2.2 Hotels/Motels

The region offers a mixture of hotel and motel facilities. Although there are more hotel rooms (2571) than motel rooms (1579) within the region, there are far more motel facilities in the region (123 versus 50). The average number of units per facility is 25 (Exhibit 2.4) and this reflects the large number of motel facilities which tend to be smaller (the majority are 25 units or less). Although the region's hotel facilities are larger (51 units on average), they are smaller than the provincial average size of 69 units. There are only 37 facilities which have a capacity greater than 35 units. In comparison with the provincial average market mix, the region has lower than average facilities for meeting/convention and tour groups. This is primarily due to the size limitations of the accommodation facilities. Since touring is such a natural and important component of tourism in the Kootenays, it makes sense to expand existing and develop new accommodation facilities which would have the capacity to handle motorcoach tours. In total, the hotels within the region represent 6% of the total hotel facilities within the province and the motels represent 17% of the provincial total.

EXHIBIT 2.4: KOOTENAY DEVELOPMENT REGION–ACCOMMODATION

	# Accommodation Units	# RV Sites
Western Portion	1559	2092
Eastern Portion	2591	1620
Total Region	4150	3712
# Facilities	173	75
Average # Units/Facility	25	61
Average Price Per Unit	$40	$10

Since the recession in the early 1980's the province's hotel industry has experienced positive growth. Both the number of hotels and average size of hotel has increased. In 1974, there were less than 1000 hotel

rooms within the region. That has now increased to 2571 in 1988, with the greatest increase occurring from 1978 to 1984. Hotels have also experienced an increase in occupancy over the past few years. In 1988, the average hotel occupancy for the region was 52%, slightly lower than the provincial average of 60%. Hotel room rates have also increased to the 1988 average of $53, although these rates are more indicative of the increase in operating costs. The provincial average was $61 per room in 1988. According to the 1988 hotel study, resort and larger properties out-perform other properties in both rate and occupancy categories. It also noted that small hotels are more vulnerable to recessionary slow downs. The performance gap, however, between smaller and larger properties narrows during better economic times.

The region's accommodation facilities also exhibit important geographical differences. Larger, all-season resort facilities have been developed in specific areas of the region which offer excellent winter and summer recreational activities. For example, the Rossland-Christina Lake, Kimberley, Ainsworth, and Fairmont/Radium/Windermere areas, are typified by four season resorts or hotel/motel facilities which offer summer and winter outdoor activities. There are also several facilities which are condominium complexes within the Fairmont/Radium/Windermere area. In addition to the resort areas, there is a high concentration of accommodation facilities located in the major urban centres of the region; Cranbrook, Nelson, Castlegar, Creston, and Fernie all have room capacities of over 200 units. For these facilities the business and meetings market segments make up a high proportion of their clientele. During the summer season the tourist market is the key segment for these facilities.

Perhaps the most important deficiency in the region's accommodation facilities is found in the quality which they offer to the visitor. With some exceptions in the Fairmont/Radium/Windermere areas and in individual instances elsewhere in the region, most facilities are not competitive with those in other tourism destination areas catering to the higher value destination market. For example, most smaller Kootenay motels are generally in need of substantial capital investment. Many were built 20 odd years ago and have not upgraded to meet the needs of many of today's travellers. This situation needs to be addressed in considering future tourism development strategies for the region.

2.3 Tourism Products – Outdoor/Sport/Adventure

When a visitor enters the region they are not just seeking a room or campsite to overnight, nor are they just looking for a place to eat. The visitor to the region is seeking an experience, be it outdoor related such as fishing, hiking, or hunting, or indoor related such as visiting a museum or heritage site or combined. Within the region there are several businesses which sell these tourism experiences as a multi-day packaged trip or as a day activity. Those activities which are packaged as a multi-day trip typically attract the destination visitor. For this visitor the Kootenay region is their primary destination and they spend many days within the region. Those operations which offer day activities typically attract the touring visitor. The Kootenay Region

may not be the primary destination for this visitor and their visit in the region tends to be shorter than the destination visitors. Facilities which offer individual activities play an important role in the region's tourism industry as they encourage the touring visitor to stop in the region, thus increasing their length of stay and expenditure while in region. The Kootenay Development Region offers a wide diversity of tourism experiences or products. Some are well developed, others are not. The following is an overview of the types of product offered in the region.

2.3.1 Sport Fishing

In 1985 a total of 707,000 angler days were generated. This represents the second highest regional share, or 15% of the provincial total. The preferred fish species within the region are rainbow, kokanee and cutthroat trout. Sport fishing is popular on the major lakes including Kootenay, Arrow, Slocan and Windermere Lakes. Many small lakes in the eastern portion of the region offer an excellent rainbow fishery. Sport fishing is also popular within the major river watersheds, Columbia and Elk river areas.

Although sport fishing is popular within the region, the facilities and services serving the sport fishing markets are generally not well developed. For instance, there are less than 10 sport fishing lodges within the region. These lodges typically have more campsites than roofed accommodation. As identified in the 1988 study, Fishing Lodges and Resorts in British Columbia, the owners of these facilities, although advertising their properties as fishing lodges, are providing more than fishing and maybe targeting the wrong market segment. Many of these facilities, in addition to fishing, offer activities which cater to more of a family market, i.e., boating, canoeing, swimming, etc. The facilities also require upgrading, but their low per diem rates (averaging $38 in 1988) do not, in most cases, generate sufficient revenues to fund major capital improvements. Lack of marketing dollars is also a constraint for these businesses.

There are also sport fishing guides within the region who provide day or multi-day fishing packages. These guides are often associated with existing accommodation facilities in the region. Also, guide outfitters offer sport fishing trips to remote wilderness areas within their guiding territory during the summer season when they are not taking out hunters.

2.3.2 Recreational Boating

Recreational boating is an activity which is often combined with sport fishing. Although recreational boating occurs on all of the main lakes within the region, there are a limited number of facilities to serve the recreational boater. Marina development in the region includes:

- Lower Arrow Lake
  - 2 marinas near the Keenleyside Dam
  - 1 marina in Nakusp
- Christina Lake
  - 2 marinas
- North Arm of Kootenay Lake
  - 3 marinas
- East Shore Kootenay Lake
  - 3 marinas
- Windermere Lake
  - 3 marinas
- Lake Koocanusa
  - 1 marina

There are houseboat operations located on Kootenay and Arrow Lakes and during the season they are generally fully booked. In addition, a 65 foot replica paddlewheeler cruises Kootenay Lake during the summer. It is noteworthy that many of the private boats using the region's marinas are owned by Alberta residents. The avid boaters visiting the region do come equipped with their own boat, and primarily require fuel. On the other hand, there are minimal services, such as boat rentals or guided boat tours for the visitor to the region who is not an avid boater, but who wants to experience the water based activities.

2.3.3 Golf

There has been a dramatic increase in the number of golf courses in the Kootenay Development Region. While much of the development has occurred in the northeastern portion of the region, golf course development or upgrading is also taking place in such communities as Nelson, Creston, Balfour, Kimberley and the Beaver Valley area. Golf is one of the key attractions for the area's resort facilities; they have experienced growth and developed plans for additional courses. Exhibit 2.5 summarizes existing and proposed golf courses in the region.

Eastern Portion of the Region

- In 1988, there were a total of 3 nine-hole courses representing 5% of the provincial total, and 5 eighteen-hole courses representing 7% of the provincial total. Today there are over 9 eighteen-hole golf courses with 5 more in the proposal stage.
- This area is fast emerging as a golf destination with 3 new, eighteen-hole courses planned at Fairmont, 1 eighteen-hole course being developed at Kimberley, and plans for an eighteen-hole course just south of Cranbrook.

EXHIBIT 2.5: EXISTING AND PROPOSED GOLF COURSES

Town	Golf Course	Holes	Proposed
Cranbrook	Cranbrook Golf Club	18	
Kimberley	Kimberley Golf Club	18	
	1 course being developed	18	being developed
Sparwood	Sparwood Golf & Country Club	9	
Elkford	Mountain Meadows	9	
Fernie	Fernie Golf and Country Club	18	
Lumberton	Palmer Barr Golf Resort	18	This is a proposed course.
Fairmont	Fairmont Mountainside	18	
	Fairmont Riverside	18	
	3 proposed courses	18	3 courses proposed - 1 in the immediate future.
Radium Hot Springs	The Springs	18	
Radium Hot Springs Resort	Radium Hot Springs Resort	18	
Panorama	Panorama Golf Course	18	
Windermere	Windermere Valley Golf Course	18	
New Denver	Slocan Lake Golf Club	9	
Nakusp	Centennial Golf Course	9	
Riondel	Riondel Golf Course	9	
Fauquier	Fauquier	9	
Crawford Bay	Kokanee Springs	18	
Kaslo	Kaslo Golf Course	9	
Balfour	Balfour Golf Course	9	
Nelson	Nelson Golf and Country Club	9	This course is being extended to 18 holes.
Castlegar	Castlegar Golf Course	18	
Creston	Creston Golf Course	18	Fall, 1990 opening
Salmo	Salmo District Golf Club	9	
Beaver Valley	Proposed course	9	Proposed 9 hole and later expansion to 18 hole
Rossland/Trail	Birchbank Golf Course	18	
Rossland	Rossland Golf Course	9	
Christina Lake	Christina Lake Golf Course	18	
Kettle Valley	Kettle Valley Golf Course	9	
Winlaw	Valleyview Golf Course	9	

- Most of the area's golf courses are heavily involved in golf packaging (the Elk Valley courses are an exception).

- The Rocky Mountain Visitor's Association has been one of the most aggressive tourism associations in the province in terms of promoting golf.

Western Portion of the Region

- In March, 1988 there were a total of 9 nine-hole courses representing 13% of the provincial total, and 3 eighteen-hole courses representing 4% of the provincial total. Today there are 11 nine-hole courses and 4 eighteen-hole courses.

- Established a golf marketing program 5 years ago using a special regional brochure. Golf packages were targeted towards Alberta, Eastern Washington (especially Spokane), Northern Idaho and the Okanagan.

- In 1985, 2,500 room nights were booked by golfers on packages. In 1986, this figure rose to 4,000. One eighteen-hole destination golf course has gone from 1,009 package days in 1984 to 3,815 package days in 1987. All golf courses have experienced a revenue increase of 30% since the program started.

Notwithstanding the growth in popularity of golf generally, it is interesting to note the success and experience of the region's operators in selling golf packages. Much of the success can be attributed to aggressive marketing and specialized brochures focusing on golf packages.

2.3.4 Hunting

Resident hunters of B.C., as well as non-residents travel to the Kootenay region to hunt a diversity of big game animals. Resident hunters can hunt within the region on their own, however non-resident hunters are required to hunt with a licensed guide outfitter. Although the resident hunter does not purchase a hunting package, they do travel to the region and purchase food, possibly accommodation and other services, thus contributing to the region's tourism industry especially during the spring and fall.

In 1988 a study was conducted on the B.C. guide outfitter's industry and the following is a summary of the study findings:

- Within the Kootenay there are 36 active outfitters representing 56% of provincial total. In 1988 these guides generated $3.9 million in revenue representing 18% of the provincial total. The industry generated 346 jobs and 930 person months for the region.

- During fall, winter, and spring the outfitters concentrate their efforts on their hunting business, in the summer months some of the region's guide outfitters will offer non-hunting activities.

- All trips are priced as all-inclusive packages ranging from $290 per day for black bear hunts to $740 per day for sheep hunts. The length of the hunt ranges from 8-11 days.
- In 1988 the guide outfitters served 960 hunting clients and 1,220 non-hunting clients.
- On average the Kootenay Region has a higher percent of medium to large scale operations. These guide outfitters maintain their operations and upgrade on an annual basis.
- The guide outfitters work with the Ministry of Environment to manage the wildlife resource within their territory.
- The guide outfitting industry is currently experiencing growth, however, that growth is being threatened as the demand on the resource increases. The most serious resource based constraints to the region's outfitting industry are:
  - access roads;
  - logging;
  - loss of land base;
  - overgrazing.

2.3.5 Winter Activities

An advantage that the Kootenay Region has is its selection and scale of winter products available to draw visitors to the region during the winter months. In other regions within the province the winter season is typically the low season, however, within the Kootenay Region this is not the case. Visitors to the region can either purchase a winter package or experience a winter activity on their own. The following is an overview of the variety of winter product offered in the region.

Downhill Skiing

There are 6 ski areas located throughout the region (Exhibit 2.6). For the most part these ski facilities were originally built as local mountains and over the past several years all facilities have expanded to attract visitors from areas outside of the region. The efforts made by the ski facilities to package and market their ski product has been successful over the past few years, as illustrated in Exhibit 2.7, where the number of skier days has increased at all of the ski facilties except for Red Mountain. Red Mountain has just been purchased by a local group and there are plans to further develop the facility to attract outside markets.

All of the ski facilities have food and beverage outlets on site. Four of the six ski hills have accommodation facilities right at the ski hill. In the case of Panorama and Kimberley, there is extensive development at the base facilities. For Fairmont and Whitewater the accommodation facilities are a few minutes away from the ski hill.

EXHIBIT 2.6: KOOTENAY SKI RESORT FACILITIES

Ski Hill	Chair Lifts	X-Country Trails	Day Lodge Mountain	Food and Beverage	On Mountain Accommodation
Kimberley	1 T-Bar 1 Double Chair 1 Triple Chair (6,500 ft. triple chair proposed)	26 km of groomed trails 3.5 km of night skiing	yes	5 F & B outlets, cabaret, night club and lounges	5 condo hotels and chalets
Fairmont	1 Platter 1 Triple Chair	20 km of groomed trails	yes	3 F & B outlets, 3 lounges, nightly entertainment	Within 3.5 km - 140 room hotel and 96 villas
Fernie	3 chairlifts 2 T-bars	groomed trails	yes	4 F & B outlets, 2 lounges	1 condo hotel RV facilities
Panorama	1 high speed detachable quad 1 handle lift 1 platter lift 1 T-bar 3 chairs	22 km of groomed trails	yes	8 F & B outlets 9 lounges	250 condos 1 hotel
Red Mountain	1 triple chair 2 double chairs 1 T-bar	50 km of groomed trails	yes	2 F & B outlets 1 lounge	2 bed & breakfasts 1 motel cabins & A-frames
Whitewater	2 double chairs 1 T-bar	groomed trails	yes	1 F & B outlet 1 lounge	all accommodation at Nelson

EXHIBIT 2.7: SKI RESORT ATTENDANCE FIGURES OVER THE LAST 3 YEARS

		SKI SEASON	SKIER DAYS	DAY PASSES
Kimberley Ski and Summer Resort				
1986/87		122 Days	101,700	$21.00
1987/88	118 Days	103,500	$21.00	
1988/89		130 Days	110,000	$24.00
Fairmont				
1986/87		80 Days	16,390	$18.00
1987/88	109 Days	16,974	$18.00	
1988/89		103 Days	19,520	$20.00
Fernie Snow Resort				
1986/87		143 Days	100,600	$20.00
1987/88	136 Days	107,500	$20.00	
1988/89		139 Days	116,500	$22.00
Red Mountain				
1986/87		125 Days	85,000	$23.00
1987/88	125 Days	85,000	$25.00	
1988/89		125 Days	85,000	$27.00
Whitewater				
1986/87		115 Days	48,000	$17.00
1987/88	115 Days	53,000	$17.00	
1988/89		115 Days	57,000	$19.00

Source: Interviews with Ski Facilities Managers. Data not supplied by Panorama.

The Kootenay Region is recognized as one of Canada's top destinations for heli-skiing and cat-skiing. Heli-skiing operations involve the use of helicopters to transport downhill skiers to remote mountainous areas to experience powder skiing. There are 3 operations within the region which offer day or over night heli-skiing packages which vary from $250 to $400 per day. Cat-skiing operations use 12-person caterpillar vehicles to transport downhill skiers to remote areas for powder skiing. Cat skiing packages are overnight and are lower priced then heli-skiing operations, $180 per day. Both activities attract international clientele from Canada, U.S., Europe and Japan.

Cross-Country Skiing

There are 15 areas within the region which offer cross-country skiing, 6 of which are associated with the downhill ski facilities. Several of the communities have also developed trail networks: Sparwood, Cranbrook, Invermere, Creston, Rossland, Grand Forks and Castlegar. Visitors who come to the region to use these cross-country ski trails may do so as a day activity or purchase a multi-day package which includes accommodation at one of the region's ski hill developments, a lodge or hotel. There are two lodges within the region which offer cross-country ski product: Mt. Assiniboine Lodge in the Rockies and Lemon Creek Lodge in Slocan Valley.

Successful cross-country skiing facilities are typically located near major urban centres. The Kootenay Region is not within a 3 hour drive of a major urban centre, thus creating a disadvantage for cross country ski development. However, this tourism product can be successful if combined with other facilities and/or activities. For example, the 6 downhill ski facilities have been able to expand their potential market base by operating cross-country ski trails. Cross-country ski facilities allow for the larger ski areas to diversify their product.

Ski-Touring

Ski-touring is a relatively new product type offered in the region. There are several options available to the visitor who wants to ski tour within the region. One can be based out of a wilderness cabin and go off on daily tours or ski from hut to hut and tour over a longer distance. The person who purchases a ski touring package is seeking a pristine wilderness experience. The prices for these packages range form $30 to $120 per day. The trips are typically small groups, 8-15 people. Within the region there are 8 operators offering ski-touring packages in the Purcells, southern Rockies near Fernie, Big Bend Country, Slocan Valley and Monashees north east of Nakusp. For those visitors who prefer to ski tour on their own, there are huts available for a minimal fee at Kokanee Glacier, Bugaboo Alpine, Top of the World and Mount Assiniboine Provincial Parks.

Other Winter Activities

Snowmobiling and ice fishing are two other winter activities which, although not currently offered as packages, have the potential to be developed as packages. Presently the Elk and Windermere Valleys are being utilized as areas for snowmobiling by Alberta residents. The Grand Forks, Castlegar and Trail areas are utilized by Spokane residents. However, there are no facilities or services within the region which cater to snowmobilers. Ice fishing is popular with both B.C. and Alberta residents on Moyie, White Swan and other lakes and as with snowmobiling, no facilities or services have been developed specifically for this group.

2.3.6 Other Activities

In addition to the previous tourism products, there are other outdoor related products which are offered within the region. Although limited in number of operators, these products all contribute to the region's diversity of tourism product.

- **Trail riding:** there are 5 guest ranches within the region. These ranches provide a base facility, such as a lodge and or cabins, from which the guests take day trail rides. There are also guide outfitters and individual guides who provide day or overnight pack trips into the back country of the region.
- **Hiking:** there are a limited number of operators who offer day or overnight hiking trips. Several of these operators use the existing park systems for their tours.
- **Wildlife observation:** although all of the outdoor/sport/adventure product is in part based on wildlife observation, there are again a limited number of operators in the region who specifically offer wildlife tours. This product may be provided by a guide outfitter or is sometimes included in a lodge package.
- **Bicycle tours:** these tours are becoming increasingly popular in the Kaslo/Slocan area with loop trips starting from Nelson and proceeding north to Kaslo and from there along Highways 31A and 6 back to Nelson.

2.3.7 Summary of Constraints to Outdoor/Sport/Adventure Product

The other outdoor/sport/adventure products are based on the unique natural resources of the region. As the demands on the resource base increase from other sectors, such as logging and mining, the very livelihood of these operations are at risk. It is not only between other sectors where conflicts over the resource base arise, it is also between the various tourism operations. For example, a winter based heli-skiing operation may want to expand into summer heli-skiing and in doing so may conflict with other summer tourism users. Conflict can also arise when resort areas choose to expand. This could require the development of new golf courses which in turn remove valuable wildlife habitat and wilderness areas.

There is a need to recognize that the very resource which is being packaged must be protected from over use. If carrying capacities are not considered, the resource on which the product is based on will be lost. In addition to resource based concerns, these operators are facing severe constraints in their ability to obtain financing for expansion, as many financial institutions are unwilling to provide funding for facility expansion.

2.4 Tourism Products – Heritage /Culture/Communities

2.4.1 Heritage/Culture

The heritage/culture of the Kootenay Development Region is significant and in some cases well developed. Nelson, for example, has been recognized as having the largest number of heritage buildings in B.C. after Vancouver and Victoria.

The Kootenay's heritage and culture generally reflects the mining and forestry background upon which the Kootenay Region based its existence for so many years. Mining museums can be found in almost every town and mining "ghost towns", such as Sandon, once a thriving mining city of 5,000, are still in evidence along the highways. Within the Kootenay Region there is a dominance of heritage attractions. Less well developed in the region are attractions interpreting prehistory and native heritage. Although it is understood that there is a rich resource base, there is virtually no interpretation activity other than limited displays in the region's existing museums.

A tremendous potential exists to develop the heritage aspect of tourism. Kaslo, Nelson and Rossland have been capitalizing on their heritage for the last few years and are good examples of how much interest can be generated for heritage tourism.

During the same time period as the Kootenay tourism study, the Ministry of Municipal Affairs, Recreation and Culture, Heritage Conservation Branch, conducted a Heritage Tourism Study. This study provides a detailed analysis of the heritage and cultural aspects of the Kootenay Region.

Attractions

Attractions serve the purpose of encouraging the traveller to remain in a town or village for at least a few hours and maybe even a few days. Obviously, the more attractions and sights to be seen, the longer the visitor will stay in the community.

There are currently very few attractions in the Kootenays which really capitalize on the volume of visitors to the region. Average annual attendance tends to be 11,000 to 14,000 persons, although large attractions such as Fort Steele Heritage Park receive as many as 60,000 visitors in a year. The main problem that these attractions are facing is that many of the heritage attractions are government funded and often only for part of the year. In some cases this means that they are not even able to remain open for the whole tourist season. Many of the region's attractions are unable to support themselves because for too many years they were not charging an entrance fee. Now that they do charge entrance fees, they are finding that they are losing their local base who don't want to pay the fee, and the visitors who do pay can't make up for the years of debt that have been accumulated.

Attractions in the Kootenays generally fall into 3 categories; Heritage, Mining and Wildlife. Some of the attractions combine 2 or 3 of these categories for interpretation.

Heritage Related Attractions, such as:

- Fort Steele Heritage Park
- Cranbrook Railway Museum
- Rossland Mining Museum
- Doukhobour Museum in Castlegar
- Sandon
- Trail Museum, Hall of Memories
- Kaslo, S.S. Moyie
- etc.

Mining Related Attractions, such as:

- Cominco Metallurgical Operations Tour
- Sparwood Murals
- Rossland Mining Museum
- Mining Tours of Balmer operation
- Greenwood, Grand Forks and Rossland
- etc.

Wildlife Related Attractions, such as:

- Creston Wildlife Management Area
- Elizabeth Lake Sanctuary in Cranbrook
- Demonstration Forest in Cranbrook
- The new Wildlife Museum being built next to the Cranbrook Chamber of Commerce
- Fall Kokanee Spawn
- etc.

Arts and Crafts

There is a very strong arts and crafts community in the Kootenays. The Invermere Arts and Crafts Association, for example, boasts approximately 60 members and Nelson has set up a retail outlet called The Craft Connection which sells works by artists in the western portion of the region. Craft retail outlets are also operating in Rossland (the Fibre Cellar), Trail (the Artisan), and Creston (Swallow's Nest Co-operative). The Creston outlet is loated at the Wildlife Interpretation Centre and retails the works of 12 local artists. Within the eastern portion of the Kootenays there are many talented artists as well, who sell their product through local craft stores. The Kootenay Marketing Group has prepared a listing of all arts/crafts people within the region and is establishing an organization for artists to market and sell their product.

2.4.2 Communities

The communities within the Kootenay region are tourism attractions in their own right. Each community offers a different experience. Some of the communities are well developed and others are just realizing the value of tourism. Most of the communities act as a single unit, however, the strength of the region's communities is in linking several together to create a Kootenay touring product.

The Elk Valley

The Elk Valley's main communities of Fernie, Sparwood and Elkford have primarily been known for coal mining and wildlife. Located within an hours drive of the Alberta border, this area has shared a strong affinity with its Albertan neighbours. The Elk Valley's winter tourism revolves around the ski hills - the major one at Fernie Snow Valley. There is very little in the way of resort-type hotels, however, there are several comfortable hotels/motels. Fernie has an eighteen-hole golf course in a spectacular setting and Sparwood

has a nine-hole golf course recently upgraded with a new clubhouse. The Westar Mine Tours have proven to be very popular with visitors to the Elk Valley.

Summer tourism in this area is reliant on the natural resources. It mostly consists of independent rather than organized hiking, photography, wildlife viewing, swimming, etc. There are several campgrounds and small golf courses. Sparwood's 82 unit hotel has just been renovated and re-opened and their 30 unit RV campsite is being upgraded to include showers and all amenities in 1990.

Cranbrook

Cranbrook began in 1898 with the arrival of the railway. Today it has become a regional centre serving an area of over 55,000 people. Cranbrook is well situated in that it is next to the Cranbrook/Kimberley Airport and on the main highway (Hwy 3/95) which travels through the East Kootenays to the popular destination resorts of the Windermere Valley. Cranbrook sees itself as the service centre of the eastern portion of the Kootenays and feels that it's positioning from a tourism perspective is as a touring rather than destination experience.

Cranbrook is trying to encourage visitors to stay longer in the City by creating more attractions, such as their plans to develop the Elizabeth Lake Wildlife Sanctuary and the Wildlife Museum which will be open for business in April of 1990. Cranbrook has also put much effort into assisting with the major expansion of the Cranbrook Railway Museum. The revitalization plans, which will be complete by August of 1990, will see a wildlife theme for the downtown core. This theme is fitting as there is a tremendous appreciation for wildlife and the millions of dollars of revenue it generates each year through hunting, guiding and wildlife viewing.

Constraints to the community's growth in tourism is felt to be directly related to the high cost of airfare to the Cranbrook/Kimberley Airport. A second constraint identified is the conflict over land use by various user groups.

Kimberley

Kimberley has undergone several changes in the last few years. Cominco has announced the closure of the Sullivan Mine forcing Kimberley to aggressively develop other avenues for economic development.

Tourism is a major thrust. The city developed a Bavarian theme with complementary festivals and events to attract summer tourists. The Kimberley Ski and Summer Resort has been actively marketed for a number of years. Kimberley as a Golf Destination is the City's high priority.

The community markets cooperatively and is able to offer outdoor packages to the tourist including skiing, golf, tennis, biking and hiking. Development of heritage, cultural and wilderness opportunities are just now being addressed. As a developing four season destination, Kimberley's concerns are identified in the need to develop improved infrastructure, highways, signage and lower airfares.

Windermere Valley

The Windermere Valley is made up of 2 main communities: Invermere/Windermere and Radium and the three large, four-season resorts of Fairmont, Panorama and Radium Hot Springs. These facilities are very popular with the Alberta markets as they are a half hour drive of each other and within 3 hours of Calgary. Due to increased marketing to international markets by all 3 resorts, there is now a larger proportion of international visitors to the area. This effect to collectively market the communities as one - the Windermere Valley, increases the marketing effectiveness and should be encouraged to continue.

Winter tourism in the Windermere Valley revolves around the ski resorts as well as some heli and cat skiing in the mid and backcountry. Summer tourism is dependent on the many golf courses, the warm Windermere Lake and various outdoor activities such as hiking, trail riding, and arts and crafts related activities which have been developed by the local arts council.

The town of Radium is limited in its ability to expand due to its current inadequate sewer system. The lack of direct air access to the Windermere Valley is considered to be a major constraint to increasing tourism. The air strip at Fairmount is open to charter flights and the communities would like to see scheduled flights developed for the area, as soon as the airport has 24 hour landing capabilities.

Creston Valley

The Creston Valley is situated on a benchland above the Kootenay River and extends north from the U.S. border flanked by the Purcell and Selkirk Mountain ranges. Much of the valley is reclaimed marshland and contains some of the most fertile land in the province. The valley's orchards have become a large part of this area's tourism appeal. Duck and goose hunting is also popular.

Creston's main summer attractions are its fruit stands, the Creston Valley Wildlife Management Area and lakeside activities. Winter tourism is not as developed as other communities. However, Creston serves as one of the main gateways for US visitors to the region with Red Mountain, Whitewater and Kimberley ski areas each within two hours drive.

East Side Kootenay Lake

The drive along the east side of Kootenay Lake on Highway 3A is one of the most scenic. In addition to Destiny Bay and other small accommodation facilities, there are also plans to add accommodation to the Kokanee Springs Golf Course at Crawford Bay. Tremendous potential exists to continue development of small, specialized lodges along the waterfront that would make the most of its natural surroundings. Constraints to tourism development in this area lie with the lack of infrastructure and the desire of residents to see this area remain relatively untouched.

Nelson

Nelson, like Kimberley, was forced to look at other avenues for generating revenue. It has successfully developed a tourism industry by focusing on its heritage and quality of life theme. Nelson's summer attractions include waterside activities, day trips to nearby towns, walking tours of the heritage buildings, professional theatre, the restoration of the tram car that used to operate along the waterfront, and a multitude of outdoor activities such as hiking, and photography. In the winter, activities are focused on the Whitewater ski hill. Constraints to tourism growth focus on the lack of air access to Nelson and the high costs of transportation.

Balfour/Kaslo/Ainsworth Hotsprings

This area of Kootenay Lake is made up of very small towns which serve together as good touring destinations. They also act as stepping off points for some of the best hiking and hang gliding in the province. The two main attractions include Kaslo's S.S. Moyie, the last of the original stern wheelers, now established as a museum; and Ainsworth Hot Springs Resort which has been newly renovated and expanded. Kaslo itself is the oldest incorporated community in the region (1893) and is home to several older homes which constitute an important heritage resource. The Langham Cultural Centre includes exhibits and attractions operating year-round. The centre also serves as an elder hostel facility - a market which Kaslo is seeking to develop.

Slocan Valley and Arrow Lake

The communities of the Slocan and Arrow Lakes are primarily dependent on the logging and mining industries. New Denver, Silverton and Slocan City offer travellers a rich mining heritage evidenced by ghost towns, mine sites and historic buildings, as well as the natural beauty of Valhalla Provincial Park, Kokanee Glacier Park and many other wilderness areas. Nakusp is noted for its hot spring resort. Improved access is a concern to the development of tourism in this area.

Castlegar

Castlegar lies at the southern end of the Arrow Lakes and at the junction of the Kootenay and Columbia River systems. The city is mid-way between Vancouver and Calgary and is a hub for highways 3, 3A and 22. Scheduled daily flights arrive at the Castlegar airport.

Castlegar's attractions include a heritage park at Zuckerberg's Island, the Doukhobour Museum and restaurant and an eighteen hole golf course. For winter activities, Castlegar is close to both Red Mountain in Rossland and Whitewater in Nelson. Castlegar has not developed its downtown core and as a result does not have a focus for visitors travelling through. Water-based recreation activities on nearby Arrow Lake are limited with the extreme water fluctuations resulting from the 74 ft. draw downs on Arrow Lakes.

Greater Trail

Greater Trail includes the cities of Trail and Rossland, the Villages of Warfield, Montrose and Fruitvale and several unincorporated communities. Greater Trail has been an industrial centre in British Columbia for the last 100 years, with Cominco Limited operating the world's largest base metal and fertilizer production complex.

For Greater Trail there has also been an effort to diversify their economy with the development of tourism. Some attractions which serve to draw visitors to this area include: 2 golf courses, downhill skiing at Red Mountain, cross-country skiing at Nancy Greene, Rossland Gold Mine Tour and Museum Complex, Cominco industrial tours, B.C. Hydro dam tours and summer theatre.

The City of Rossland is emerging as a resort area with its downhill (Red Mountain) and cross-country (Blackjack) ski facilities, full service hotel with business capabilities, motel, bed and breakfast, successful summer theatre production (The Gold Fever Follies), the heritage revitalization of the downtown core and the restoration of the Miner's Hall.

Access to Greater Trail is perceived to be a constraint to the development of tourism. Lack of infrastructure is also a concern.

Grand Forks/Boundary

Located in the southwesternmost corner of the Kootenay Development Region and bordering the United States, this area includes the communities of Grand Forks, Greenwood, Midway, Rock Creek, Beaverdell and the popular summer resort area of Christina Lake. These communities lie on Transprovincial Highway 3 and

act as a link with the neighbouring Okanagan region. The rich Doukhobour and mining history of this area is of significant interest to visitors, with both Grand Forks and Greenwood having major concentrations of heritage buildings. As well, the proximity to historic mine sites and the beauty of the natural resources create opportunities for touring.

2.5 Implications for the Tourism Development Strategy

The preceding product assessment demonstrates the range and diversity of the region's tourism products, facilities, and quality of operations. Some of the more important considerations in designing a tourism development strategy are summarized below.

1. **The region's resource base is spectacular.** A variety of natural settings combining mountains, lakes and river systems endow the region with a natural setting unmatched by most other destinations. Although the current tourism product has taken some advantage of this in the form of touring, biking, skiing, backcountry adventures, and the like, there is considerable development potential still remaining for a growing market.

2. **The region has a diverse tourism product.** This can be both a strength and weakness. At the present time, there are not many well-developed product themes or a real market focus for the Kootenay Development Region which distinguishes it as offering a special experience distinct from many other locations. However, the strength in the region's tourism diversity is that it can provide a variety of distinct product themes relatively easily through careful planning and product development.

3. **One of the region's strengths is its communities.** The interest of communities throughout the region in diversification into the tourism sector is strong and enthusiastic. This provides an excellent foundation for development of community based tourism. However, the communities themselves point to a lack of coordination as a constraint to realizing their full potential. In spite of the size of the region there are clusters of communities which can serve as theme area "centres" or "nodes" for product development.

4. **There is a strong potential for heritage tour or package development.** The region is endowed with a surprising array of heritage resources ranging from interesting downtowns (e.g., Nelson, Rossland) to the ghost town area of the Slocan Valley. With some co-ordination and proper packaging, this product area could serve as a major regional attraction. Of particular relevance here is the growing popularity of circle tours, particularly in the western portion of the region.

5. **With some exceptions, the region's tourism plant and industry needs to upgrade its operations and update its facilities.** Many of the region's tourism operations are "lifestyle" based. While this is not a problem in itself, it does tend to constrain the potential for development of the region's tourism product to its full potential. Other issues which regional operators face include problems in addressing the off-season and financing for facility upgrading. In many instances, the region's product is based on the touring markets of the 1960's and 70's. The market, however, is changing; competition is increasing; and many operators must change to meet new market expectations in order to survive.

6. **Many of the regions attractions are not self-sufficient.** They depend on government funding for the most part and their hours of operation and quality of facility reflect the uncertainty which goes hand-in-hand with this financing approach. There is a real need to aggressively pursue self-sufficiency to ensure that these attractions develop and remain a strong component contributing to the tourism sector.

3.0 MARKET OVERVIEW

It is important to understand the existing tourism markets to the Kootenay Development Region in order to make decisions on tourism development and marketing. Market characteristics which are important to consider include visitor origin, age, sex and income. In addition, it is important to understand the trip characteristics of the visitor to the Kootenay Region. These include mode of travel, purpose, accommodation, activities, and expenditure patterns.

Historically the market research conducted by the Ministry of Tourism has been developed for the 9 tourism regions in British Columbia. The Kootenay Development Region incorporates two of these tourism regions - Rocky Mountain and Kootenay Country. These two tourism regions cover the entire development region, but also include Golden which is not part of the development region. As Golden is on the Trans-Canada Highway it attracts a large proportion of travellers who are heading for destinations outside the region. As a result, the tourism data for the Rocky Mountain region is not entirely indicative of the eastern portion of the Kootenay Development Region. However, as this market data is the only available market data for the region at this time, it has been used for this study.

3.1 Visitor Profile

The Ministry of Tourism's Visitor '87 study presents the results of an out-of-province visitor survey conducted during the period of June 21 to October 31, 1987. The following is an overview of the survey results as they pertain to the two Tourism Regions included in the Kootenay Development Region; Kootenay Country and Rocky Mountain. It is important to note that this data only represents the non-resident visitor to the province during the summer and fall seasons. **B.C. resident travel was estimated to represent 45% of BC's tourism industry in 1987 and, therefore, the following data represents between 25–30% of the region's tourism industry in 1987.**

Market Profile

During the survey period a total of 159,000 party nights in Kootenay Country (2% of the provincial total) and 795,000 party-nights in Rocky Mountain (10% of provincial total) were generated by non-resident visitors. The total number of parties visiting the Kootenay Country Region was 65,000 and 290,000 for Rocky Mountain Region. The average size of visitor parties was 2.7 persons for Kootenay Country and 2.8 persons for Rocky Mountain. More than half of the parties (50-56%) were comprised of two adults. Twenty-one percent of Kootenay Country visitors were travelling with children, while in the Rocky Mountain Region, 27% were travelling with children.

The significantly higher figures for the Rocky Mountain Region reflect the large volume of travellers on the Trans Canada Highway. As the majority of these visitors were travelling through Golden and did not enter the Kootenay Region, it is not possible to determine the actual party nights for the region.

The non-resident market to these two tourism regions was very similar in origin. If averaged, the market was comprised of 53% Canadians, 40% U.S., and 7% international visitors. Based on detailed results of Visitor '87 and other provincial market surveys, the dominant Canadian markets were Alberta and Ontario. The west coast states of Washington, California and Oregon comprised the greatest share of U.S. visitors.

Method of Travel

Visitors to the region in 1987 primarily travelled in their own automobile (Exhibit 3.1). Recreational vehicles were also a popular mode of travel. Seven to ten percent of the region's visitor travelled in rented automobiles. Only 10-12% of the visitors to the region during the summer and fall of 1987 arrived by air. This is significantly lower than the provincial average of 30%.

Main Purpose of Trip

Touring was the most common trip purpose for the region's non-resident visitors (Exhibit 3.1). Following touring, the next most popular reasons for visiting the region were:

- outdoors trip, wilderness/adventure;
- friends and relatives;
- resort.

Again, due to the influence of the high volume of highway travellers along the Trans Canada, the percentages for the Rocky Mountain region were not an accurate reflection of the region. This was especially true with respect to the percentage of visitors who identified a resort visit as their main trip purpose. If these percentages were recalculated with the visitor who was passing through Golden taken out, it is projected that the resort percentage would be higher for the Rocky Mountain region.

In comparing the regional percentages with the provincial percentages, the differences for the most part reflect the different types of product offered in this region. On a provincial level, business and city touring trips were higher percentages than those for the Kootenay region. From the regional perspective, the outdoor trip, wilderness/ adventure and resort vacations were higher than the provincial average.

EXHIBIT 3.1: MARKET OVERVIEW

	B.C. Rockies %	Kootenay Country %	Province %
Origin			
Canada	50	58	34
U.S.	42	38	57
International	8	6	10
Method of Travel to B.C.			
Own Automobile	67	68	48
Rented Automobile	6	0	8
Recreational Vehicle	25	31	14
Bus	2	0	3
Plane	10	12	30
Main Purpose of Trip to Region			
Business	3	5	10
Conference	2	5	5
Friends and Relatives	35	42	38
Touring Trip	63	67	56
City Trip	3	2	11
Personal	4	4	6
Outdoors Trip	37	35	20
Wilderness/Adventure	12	6	10
Resort	23	15	14
Cruise	2	2	7
Theme Park	10	7	6
Special Event	2	9	5
Party Size	2.8	2.7	2.64
Accommodation			
Hotel	3	--	16
Motel	30	26	24
Campground	42	38	24
Friends/Relatives	13	20	26
Resort/Lodge	9	10	4
Cottage/B&B	2	6	2
Other	1	--	4

	B.C. Rockies %	Kootenay Country %	Province %
Activities			
Shopping	31	26	37
Tour	6	7	11
Sightseeing	46	43	50
Passing Through	27	29	21
Business	1	4	8
Outdoor Activities	51	25	28
Sporting Activities	22	15	11
Beach/Lakeshore	16	39	27
Museum/Gallery	6	9	11
Historic Site	14	11	14
Gardens/Parks	18	12	25
Friends/Relatives	19	34	26
Average Expenditure per Party	**$92.00**	**$72.00**	**$132.00**
Average Expenditure per Person	**$32.00**	**$27.00**	**$50.00**

Source: Ministry of Tourism, Visitor 1987.

In comparing trip purpose by origin, some interesting features emerge. The main trip purpose of Canadian visitors to the region was visiting friends and relatives, while touring was the most popular trip purpose for U.S. and international visitors. Canadians were also more likely to visit a resort than the other markets (35% for Rocky Mountain and 19% for Kootenay Country). In the Kootenay Country and Rocky Mountain Regions, 53-54% of the U.S. visitors cited an outdoor or wilderness/adventure trip as their main reason for visiting. For the international traveller, 61% of those who visited the Rocky Mountain Region cited an outdoor or wilderness/adventure trip as their main trip purpose. However, for the Kootenay Country Region only 45% of the international visitors chose this trip purpose.

The length of stay within the region is a reflection of the trip purpose. Average length of stay was 2.5 days for Kootenay Country and 2.7 days for Rocky Mountain. Within the Kootenay Country Region, 68% of the visitors stayed 5 or more nights. For the Rocky Mountain region this percentage was lower, 49%, and again is a reflection of the influence of the Trans-Canada highway traveller passing through Golden. The majority of international visitors to both regions stayed 8 or more days within the region.

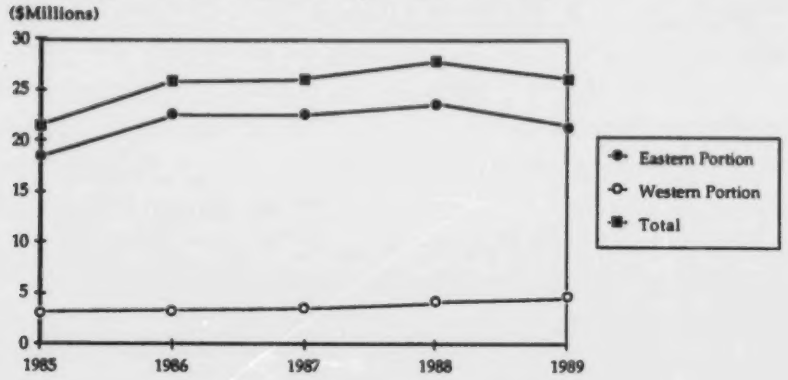
Accommodation

While in the region, the non-resident visitor typically stayed in a campground or motel (Exhibit 3.1). The percentage of visitors who stayed in campgrounds (38%-42%) was significantly higher than the provincial average of 24%. Between the two regions the percentages varied very little, however, the percentages for the motel, campground and hotel categories were slightly higher for the Rocky Mountain Region. More visitors to the Kootenay Country Region stayed in bed and breakfast facilities than in the Rocky Mountain region. These small differences could very well be a reflection of the differences in the type of accommodation available within the two regions.

Differences in choosing accommodation occurred by origin. Over half of the U.S. visitors (57%) stayed in campgrounds in the Kootenay Country Region. This was slightly lower for U.S. visitors to the Rocky Mountain Region (44%). The international visitors to Kootenay Country were more likely to stay at a resort or lodge (56%).

Figures collected by Central Statistics Bureau from the provincial room tax and reflected below, clearly depict the vast differences in room rental expenditures between the east (Rocky Mountain) and west (Kootenay Country) over a four year period.

Change in Total Room Rental Expenditures 1985-1989



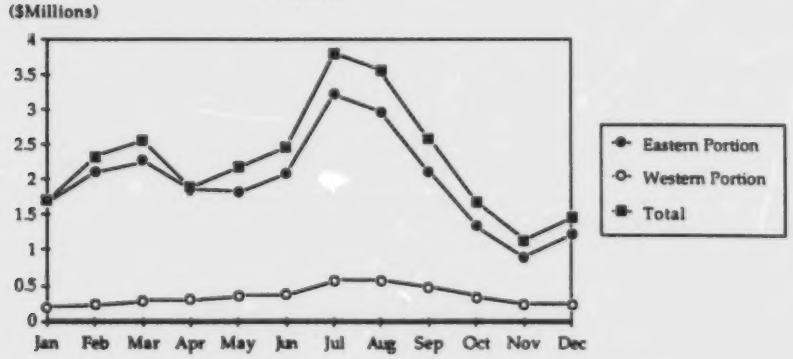
Activities Pursued By Visitors

The most popular activities pursued by the visitors to both tourism regions focused on outdoor/sport activities. Participation in the three outdoor categories combined (outdoors, sporting and beach/lakeshore) and listed in Exhibit 3.1, is significantly higher (Rocky Mountain 89%, Kootenay Country 79%) than the provincial average of 66%. These numbers are again a reflection of the types of things to do and see that are offered to the visitor within the region. The percentages for sightseeing and shopping were slightly less than the provincial average.

The activities varied somewhat by origin. Outdoor activities were more popular with Canadian visitors to the region. Sightseeing was more popular with the U.S. and international visitors.

It is interesting to note that from a year-round perspective (as seen from Central Statistics numbers depicted in the graph below) the eastern portion of the region has been more successful at developing a winter season business than the west, although still experiencing sharp declines in the shoulder seasons.

Room Rental Expenditures 1988
Seasonality



Expenditures

On average the visitor to the Kootenay Region spent less than the provincial average (Exhibit 3.1), while visitors to the Rocky Mountain region spent more per day than visitors to Kootenay Country. The single greatest expenditure was on accommodation followed by restaurants and auto transportation. Visitors spent an average of $5.00-$6.00 on shopping/souvenirs, a significantly lower amount than the provincial average of $19.00. Clearly these statistics reflect the fact that the region is lacking in activities, attractions, facilities, etc., to entertain the visitor and to encourage them to spend money within the region.

3.2 Market Segments

There are several ways to separate the tourist markets to the Kootenay region. They can be segmented by origin, income, or by trip characteristics. In reviewing the results of Visitor '87 and based on our knowledge of the B.C. tourism markets, the markets to the Kootenay Region can be divided into two broad groups:

- highway travellers
- destination travellers

The highway traveller is the visitor to the region who spends 2 or less days within the region and is primarily travelling enroute to another destination. As this visitor spends little time within the region, they will typically have a low per diem expenditure. The destination traveller on the other hand will stay longer and spend more within the region. For this visitor the region is their destination, as they may be coming to the region to participate in an activity or stay at a specific facility. The destination visitor can then be divided further into segments based on the specific purpose of their visit, i.e., sport fishing, golfing, touring etc. The following sections describe some of the key market features of these segments.

3.2.1 Sector Specific Markets

Golf

The following is a summary of the market findings of the 1988 study of Golf Tourism in British Columbia:

- Primary markets for golf in this region include: Alberta, Eastern Washington, Northern Idaho, and the Okanagan.
- A 1983 National Golf Foundation Study shows 73.5% of all golfers from Northwest U.S.A. as male, 18% as retired, and a median age of 42.3.

- Seniors are an important target. Persons over 60 years comprise 16.5% of all golfers, account for 33% of all rounds, and 26% of all spending. Just under 20% of all reported golf vacationers are seniors.

- 44% of frequent Canadian golfers are aged 25-54, and 43% are over 55 years of age.

Hunting

By the very nature of their business, guide outfitters attract a non-resident market. Resident hunters from outside the region also contribute to the region.

- 66% of the non-resident market is from the U.S. with California (11%) and Washington (11%) representing the largest share. 17% is from Europe - 6% from Germany, 17% of the market is from Canada of which 9% is from B.C. and 7% is from Alberta.

- The typical non-resident is male between the ages of 35-54 and travels alone. 81% of the hunters to B.C. purchased more than one hunting trip in a year.

- The features important to greater than 80% of the non-resident hunters surveyed in choosing a guide outfitter were:

  - quality of guides
  - success rate
  - services
  - remote wilderness
  - variety of species to hunt

- There is a strong loyalty to the B.C. hunting product, 89% of the non-resident hunters surveyed are planning on returning within the next 5 years and 74% will return to the same guide outfitter.

Sport Fishing Lodges

- B.C. residents account for the largest share of the market (40%). Canadians account for 50% of the market, U.S. 41% and Europe 6%. Washington (17%) and California (13%) are the primary U.S. markets.

- The typical visitor is male aged 35-54 years. Families (38%) and couples (30%) are the two main groups.

- A recent survey conducted in Washington, British Columbia and Alberta indicated that there is a demand in the double income family group for a quality freshwater fishing product. Currently this demand is not being met and in order to do so, several of the lodges will require facility upgrading to meet the needs of this market segment.

Heli-skiing

- The majority of heli-skiers are males aged 20-54 years, (38%)
- The U.S. (38%) accounts for greatest market share, (Pacific North West 11%, California 12%), 26% are from Europe, 11% from other overseas, and 25% are from Canada (9% BC, 8% Alta).

Cat-skiing

- Primary markets for cat-skiing are close-in, predominately Pacific Northwest, Alberta (Calgary), and B.C. (Vancouver).

Ski-touring

- Market information is limited, however, ski touring is known to attract western Canada and US markets, telemark skiers from eastern Canada and U.S. form a small part of the market profile.

Cross-Country Skiing

- 62% BC, 16% Alta.
- 32% are aged 20-34 years, 40% are 35-54, while 16% are 55-64 years of age
- Couples 30%, singles 28%, groups 25% and families 17%.

Snowmobiling

- major markets are in the mid-US, however, there is limited development of activity in B.C., Alberta and prairie provinces.

4.0 GENERAL MARKET TRENDS

It is important to consider overall B.C. tourism market trends in reviewing potential development opportunities for the Kootenay Region. Some of the key trends which will influence the success of tourism development in the region are described below.

1. Market is Segmenting

The market is dividing into segments which are based on special interests, seniors, golfers, anglers, families, bird watchers, etc. These market segments have a dramatic impact on how the product is packaged and who it is marketed to.

2. Changing Sources of Visitors

Traditional close-in markets such as Alberta and Washington are decreasing in market size (from 53% in 1979 to 33% in 1987) and the long-haul markets are increasing in market size (U.S. increased from 47% to 56%, international increased from 6% to 10%). With this change in market origin comes new demands for product type and quality, as well as a need for increases in marketing dollars to reach these long haul markets.

3. Changing Mode of Transport

More visitors are arriving by commercial carriers. The number of visitors arriving by air to B.C. is increasing, however 69% of the visitors to the province arrived in their own vehicle.

	1974 %	1979 %	1987* %
Auto	74	60	55
RV	8	15	14
Air	7	19	30
Bus	5	2	2
Rail	n/a	1	1
Ferry	4	2	11

* In 1987, respondents could indicate more than one mode.

In order for those visitors who arrive by air to access the Kootenay Region there is a need for good air links between the region and the main urban centres within B.C. and Alberta.

4. Mini-Vacations

The amount of leisure time enjoyed by the U.S. citizen has shrunk by 37% since 1973. There is a marked trend away from long summer vacations to more frequent mini vacations which are attractively packaged and accessible. This trend is especially prevalent in urban centres, therefore, there is a need to develop and market 2-5 day packages to target the accessible urban centres surrounding the Kootenay Region.

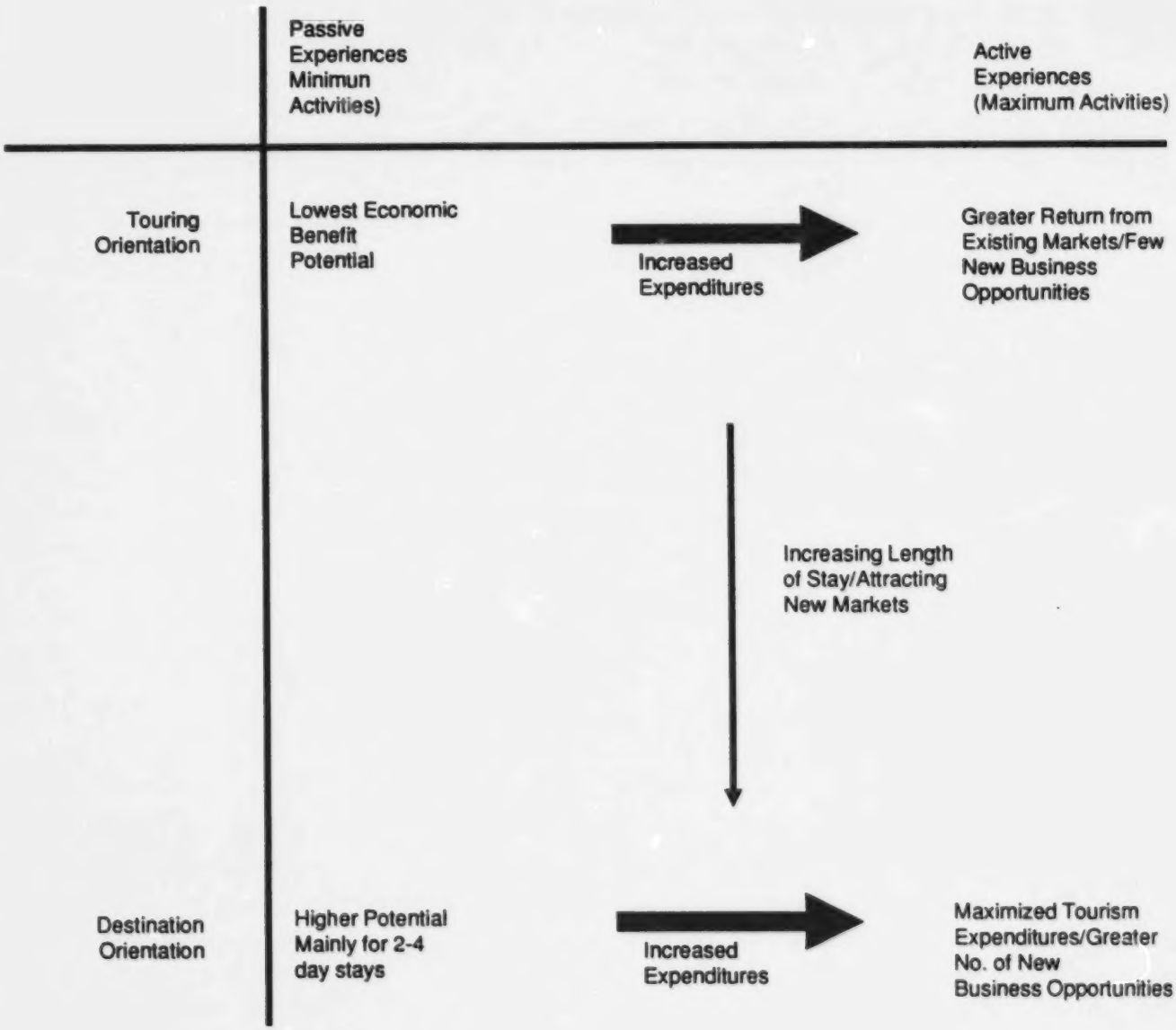
5. Increased Competition

As B.C. turns to the tourism industry to diversify its economy, so do all of the other provinces and states within North America. As a result the competitive environment for tourism is increasing. The tourism sectors, therefore, must be knowledgeable about their target markets and needs and expectations of those markets.

4.1 Tourism and Economic Benefits

In considering tourism development opportunities, it is important to recall the relationship between economic benefits to any given region and the nature and type of tourism development that leads to those benefits. The market trend towards a more segmented market seeking special interest experiences offers a significant potential for increasing tourism expenditures. Usually greater expenditures are derived from these specific destination market segments than from the general touring vacationer. The relationship is shown in Exhibit 4.1. As one moves from a touring product to either a destination product or more activity-intensive activities for the touring vacationer, one can expect greater returns and greater economic benefits.

Exhibit 4.1: Development Plan/Tourism Expenditures Relationship


Passive Experiences Minimun Activities)
Active Experiences (Maximum Activities)
Touring Orientation
Lowest Economic Benefit Potential
Increased Expenditures
Greater Return from Existing Markets/Few New Business Opportunities
Increasing Length of Stay/Attracting New Markets
Destination Orientation
Higher Potential Mainly for 2-4 day stays
Increased Expenditures
Maximized Tourism Expenditures/Greater No. of New Business Opportunities

5.0 INSTITUTIONAL CONTEXT

The results of the interview process with the region's stakeholders and the Task Force workshop meetings clearly point to a strong interest in tourism development and recognition of the benefits which viable development can mean for the region in terms of economic diversification, job opportunities, and small business opportunities. This interest and enthusiasm must be translated into an institutional environment conducive to implementation. No matter how well thought out and justified in market and feasibility terms any particular tourism development opportunity may be, institutional constraints (if not addressed) can serve to discourage both private sector entrepreneurs and community and government advocates of tourism. Therefore, it is vital that the institutional environment be assessed to identify problem areas and suggestions for institutional changes which can further the results of this study process towards implementation.

The findings to-date reveal a number of areas which present issues and possible constraints to an effective tourism development program. These are:

- the tourism development approval process;
- the absence of a strong industry voice;
- constraints on community roles in tourism;
- factors limiting private sector opportunities;
- the nature of government as a stakeholder in the process.

5.1 Tourism Development Approval Process

The institutional context for tourism development is concerned mainly with two areas:

- the degree to which the tourism development approval process facilitates tourism product development;
- the degree of commitment of stakeholders, and their issues and concerns related to tourism development.

A developer who requires land to lease or buy is looking at one of two possibilities: a) to purchase or lease private land or b) to purchase or lease Crown Land. In the case of the former, the developer will be required to apply to the municipality or regional district involved and meet the standards (zoning bylaws, etc.) for

developments within municipal, or regional district boundaries. This is a relatively straightforward process, given that municipalities have policies and regulations in place to guide the overall development process, of which tourism developments are a part.

Far more complex is the case where a prospective investor seeks to purchase or lease Crown Land. In this case, the proponent is required to submit an application to the Ministry of Crown Lands specifying:

- the property proposed to be leased or purchased;
- the type of business;
- financial proforma covering a five to ten year period.

Once a complete application is received, the Ministry of Crown Lands will refer the application to those ministries deemed to be affected by the application, such as:

- the Ministry of Environment -- who will assess the impact that the proposal will have on the natural resource base as well as on any users who may have Ministry licenses (e.g., guide outfitters);
- the Ministry of Forests -- who will assess the impact on forest harvesting plans in the particular area;

Once all ministries have submitted their comments and recommendations, the Ministry of Crown Lands proceeds to dispose of the application. Options are refusal, approval, or approval with conditions.

This approval process currently operates without reference to an overall resource management or land use strategy which reflects the combined views of all ministries. Inevitably, therefore, serious conflicts over land use can arise, and some have been known to take up to one and one-half years to resolve, although the average time between application and approval is about 90 days. This situation creates considerable uncertainty for tourism investors, particularly in areas where further development of one tourism product (e.g., resort/golf facilities) will conflict with other products already in place (e.g., guiding territories). The Ministry of Crown Lands is put in a position of arbitrating land use conflict issues in the absence of an overall plan accepted by other ministries and the public at large. This ad hoc approach can, in fact, discourage private sector investment interest and reduce the potential for developing a strong tourism sector over the long term.

The Province is currently seeking to address this problem in part through the development of a comprehensive policy for backcountry land use. Presently coordinated by the Ministry of Crown Lands, the policy development process involves ministries with an interest or mandate in backcountry land use. It is

understood that a draft policy will be released for public comment some time this year.

5.1.1 Industry Stakeholder Involvement

Industry also plays a role in the deliberations on tourism development approvals, mainly through associations or industry organizations.

Regional Tourism Associations

There are two regional tourism associations within the Kootenay Development Region: the Kootenay Country Tourism Association and the Rocky Mountain Visitors Association. It is their responsibility to act as a collective voice in the representation of tourism interests for their region. In addition, it is their responsibility to market the region as a whole to the region's target markets. Through the Partners in Tourism Program, companies can apply to have half their marketing costs, up to a fixed ceiling, matched by provincial funds. This enables the tourism region to project a clear, unified voice in terms of theme and image to the target market. This is not an easy task for a region as diverse as Kootenay, where there are several different types of product catering to different target markets.

The purpose of the associations is to entice more visitors to the area and to encourage those who are already coming to stay longer. To this end they do not become involved in the development of new projects except to the extent that they provide market information and introduce the prospective investor to the development arm of the Ministry of Tourism. They do not play a major role in the tourism development approval process, except in the case of general policy areas which affect the majority of their member operators.

Sector Associations

There are several sector associations which do liaise regularly with ministries concerning tourism development. The Southern Guides Association attempts to protect the interests of guide outfitters from other users of the resource, as well as acting as a lobby group for the interests of wildlife conservation. This association does not have a say in the designation of land use, but does act as a voice representing its 27 members who generate several millions of dollars to the regional economy each year.

Other associations or loosely organized sector-specific operators include:

- fishing resorts and lodges;
- hotel, motel and campground associations;
- adventure travel operators (e.g., heli-skiing, cat skiing, etc.).

All of these associations will provide input to ministries, depending on the nature and specifics of the development approval sought. For example, the B.C. Hotel, Motel and Campground Association deals mainly with financial issues rather than specific development (e.g., the hotel tax). On the other hand, fishing resort operators are actively involved in concerns related to resource use conflict in this region and throughout the Province. In most cases, input is provided through the network that these organizations establish with regional offices of the ministries and through Victoria.

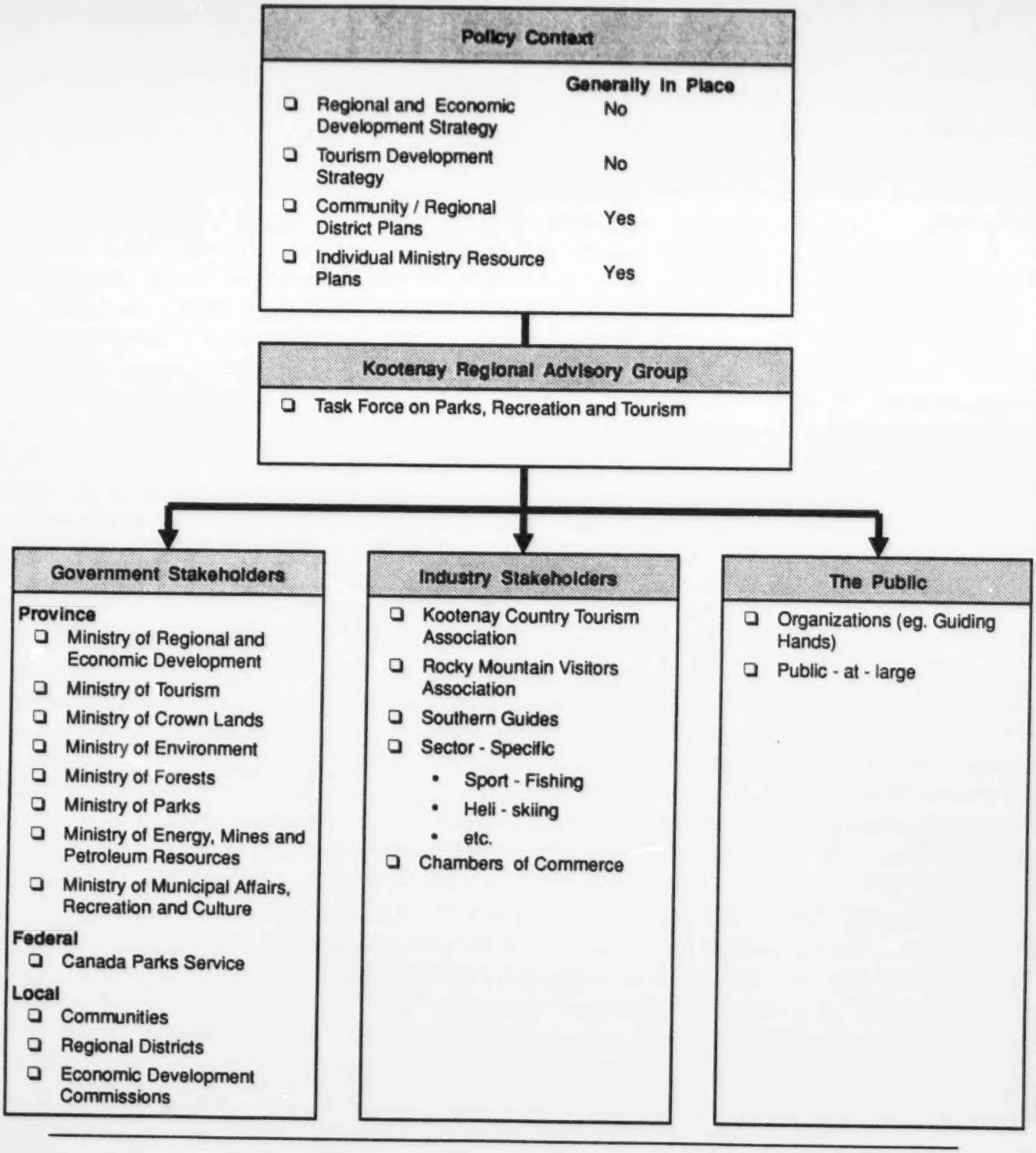
5.1.2 Public Involvement

Public involvement is usually exercised through the activities of interest groups such as the Guiding Hands Recreation Society, the B.C. Wildlife Federation, and other such groups. Their involvement tends to be focused on major proposals for which potential land use conflicts are sharply defined and understandable. At the same time, these groups consistently lobby government to rationalize the approval process for land use outside community areas in the region.

5.1.3 Implications for the Tourism Sector

Based on extensive interviews throughout the region, it was found that stakeholders generally pointed to the **absence of a tourism development or land use strategy** as the major overriding concern at this time. Whereas community development processes are well in hand, tourism development which requires the use of Crown Lands in some form outside communities, tends to be subject to land use conflict issues which are serving as a continual source of frustration. In particular, the northeastern portion of the region (Invermere and vicinity) is experiencing problems at this time. This is not surprising given the success of the tourism sector in this area and the degree to which this area sustains a wide range of tourism activities from high-end resorts to heliskiing. Exhibit 5.1 summarizes the institutional context for development approvals -- showing the relationship between stakeholder interests and the current policy framework within which tourism development applications are resolved. In the opinion of many ministries, the absence of an integrated policy framework has led to a tendency to recommend refusal on most applications where conflicts between competing users arise. Ministries, industry stakeholders, and other groups all express frustration at the situation.

Exhibit 5.1 Institutional Context



5.2 An Industry Voice

A second major issue which arises as part of the institutional context for tourism development is the **absence of an industry voice promoting an overall tourism development strategy for the region**. The problem is that industry itself cannot advise regulatory agencies (provincial ministries and communities) of the overall direction in which it desires to proceed in order to strengthen and enhance the tourism sector. The current task force process aimed at identifying tourism development opportunities provides an excellent forum to initiate action towards consideration of an overall tourism development strategy.

By having a tourism development strategy in place, industry and other stakeholders alike can point to the strategy as the direction for tourism development in the region. As such, it can be used as an evaluation tool for input to development approval processes and for guidance by government agencies and communities seeking to encourage development in the tourism sector. It also serves as a means of establishing priorities for greater economic diversification into tourism.

The importance of the strategy is not just restricted to the development approval process. It also serves to provide guidance to government agencies charged with developing and maintaining a sound infrastructure plant in the region. For example, decisions on priorities related to the transportation system (roads and airports) should be made with the tourism sector in mind. A tourism strategy that has the support of the region can help immeasurably in this process.

5.3 Community Objectives and Roles

Discussions with communities reveal that, for the most part, community development processes related to the tourism sector are well in hand. The major issues expressed by communities relate to:

- the limited availability of funding support for their initiatives;
- the lack of coordination amongst the communities -- that is, a regional approach to community tourism products.

There is, for example, considerable potential to develop heritage tours and packages focusing on the region's heritage resources. This approach, however, requires the support and cooperation of communities in defining their roles and priorities for development of their heritage product. At the present time, the emphasis tends to be on providing activities for the touring customer. With coordination, it is possible to build on the strong heritage base to offer more of a destination product.

The heritage resource area is but one example where communities can coordinate their activities in cooperation with the private sector to offer an interesting and saleable package. The key is to encourage cooperation and coordination, so that the strengths of each community for the particular product theme is reflected in the product offering and follow-up marketing.

5.4 Constraints on Private Sector Opportunities

One issue that has arisen through discussions with stakeholders in the region relates to the role of government in the tourism sector. Specifically, concerns were raised about the degree to which the Ministries of Forestry and Parks provide such facilities as campgrounds in cases where the private sector could reasonably be expected to develop and offer the same services. This is but one illustration of a larger policy issue related to the appropriate role for the private sector in offering products and services in areas where governments now operate. For example, in most jurisdictions there is a real move towards more private sector participation through mechanisms such as:

- leasing operations of campgrounds and other facilities to private sector operators;
- having the private sector run tour programs through concession systems.

There are numerous opportunities in this sort of partnership role between government and the private sector to create small business opportunities and still assure that the public interest is protected. A government which is responsive to this approach will help set a positive institutional environment encouraging to potential entrepreneurs. While there are not sufficient resources in this study to fully explore this issue, it is worthwhile to review current policies and examine the extent to which these policies might be adjusted, if appropriate, to further private sector participation.

Another constraint on private sector operators relates to the matter of financing for tourism development. Historically, financial institutions have not viewed tourism projects as favourably as those in other economic sectors. Evidence of this problem abounds not only in the Kootenay region, but also for the tourism industry throughout British Columbia. The problem is one of both attitude and lack of awareness on the part of financial institutions about the tourism industry generally. Therefore, as a supporting activity for the region's opportunity strategy, efforts to educate and encourage financial institutions to participate more effectively in tourism development should be made.

Public sector programs to provide financing assistance for tourism development projects have included the Tourism Development Agreement - oriented specifically to tourism projects, and other loan assistance programs of the province. The difficulty with the Tourism Development Agreement programs relates to the fact that they are oriented specifically to measure destination projects. Smaller tourism developments projects are ineligible under the program.

A further constraint on financing relates to the capability of operators to undertake business plan development which satisfies the requirements of financing institutions, be they public or private. This is particularly true for smaller or first time operators and is an important area for support to encourage the private sector to invest in the region's tourism potential.

5.5 The Role of Government

The government's role in tourism is exercised through a variety of direct and indirect mechanisms. Just as communities themselves observe that there is not a coordinated approach mechanism related to their objectives for tourism, many observers also note that the government sector is also not well coordinated in offering a focus and voice on tourism development. To be fair, government initiation of this study process is aimed in part at resolving this concern amongst region stakeholders. Nevertheless, the fact that there are so many government agencies involved in direct or indirect ways with the future of tourism in the region, makes it essential that some attempt be made to rationalize the role of government as an active partner in tourism development.

5.6 Overall Implications for Tourism Development

Both the Ministry of Tourism and the Ministry of Regional and Economic Development have specific programs intended to encourage tourism product development throughout British Columbia. Other ministries are also giving greater recognition to the importance of the tourism sector. For example, the Ministry of Crown Land's recent study, funded by the Ministry of Regional and Economic Development at the request of the Kootenay Task Force on Parks, Recreation and Tourism, on Kootenay Region Winter Recreation Opportunities, illustrates this point. Nevertheless, there is a greater need to focus efforts and to attempt a greater fit with regional objectives and aspirations (the issues which many communities face relative to funding for tourism-related projects underscores this point). The concern of many stakeholders with the delays in the development approval process, particularly for middle and backcountry use in the region, are other examples of areas where government attention is required.

A summary of the key institutional issues and possible actions to reduce perceived constraints on tourism development is shown on Exhibit 5.2. In reviewing what can be done to address institutional issues, three general themes emerge:

- the need for commitment to a tourism development strategy as a means of galvanizing support in action by stakeholders from both the public and private sector;
- the need for coordination mechanisms which provide a focus for pursuing tourism development, be it by communities or the private sector;
- the need for a more focused and coordinated government role in "partnering" with local communities and the private sector to further tourism development consistent with the aspirations of local regional residents.

EXHIBIT 5.2: SUMMARY OF KEY INSTITUTIONAL ISSUES

Issues/Constraint Area	Possible Actions to Reduce Constraints
1. Tourism Development Approval Process	. Commitment to tourism strategy by industry and government . Use of tourism strategy as guideline for development project review . Establishment of an integrated policy framework . Encouraging work similar to the Crown Lands Winter Recreation Opportunities Study by government
2. Industry Voice on Overall Tourism Sector Development	. Support for tourism strategy . More participation in region-wide planning and decision-making (e.g. transportation) . Encouraging recognition of importance of tourism sector
3. Communities	. Develop co-ordination mechanisms with other communities and industry/provincial government
4. Joint Public-Private Sector Opportunities	. Review/discussion of public sector policies for leases, concessions and regulatory regime in context of tourism development objectives . Educate and encourage financial institutions to participate more effectively in tourism development
5. Co-ordinated Government Role	. Investigate mechanisms to co-ordinate inter-ministry efforts in tourism sector support . Review of tourism support programs to maximize effectiveness . Develop stronger partnership position with industry

6.0 PUBLIC INPUT

Fundamental to a sound tourism development opportunity strategy is exploration with the public into their aspirations for tourism, ideas and concerns. In this way, the final strategy will better reflect regional and local objectives for tourism and will assist the Task Force on Parks, Recreation and Tourism in the deliberations concerning regional development priorities.

6.1 Public Input Process

To ensure the widest possible exposure for the public, a series of seven open house/public meetings were held in communities throughout the region;

- Invermere
- Kimberley
- Fernie
- Creston
- Grand Forks
- Rossland
- Nelson

Advertising for the meetings included newspaper and radio announcements, as well as a mail out announcement to the two regional tourism associations, local governments, and chambers of commerce.

The meetings were structured in an open house format during which individuals could review panel exhibits and handout on study progress and discuss their ideas directly with study team representatives, followed by a public meeting format with presentations on the strategy to date and a question and answer session. In addition to recording comments and questions at the meetings, a questionnaire was distributed and attendees were encouraged to submit written responses prior to leaving the meeting.

While the tourism component was the main focus of the meeting, information was also presented on progress of the study of heritage resources in the region, commissioned by the Ministry of Municipal Affairs, Recreation and Culture.

6.2 Public Input Results

The meetings were well attended and demonstrated a general level of enthusiasm for exploring how tourism development can make a significant contribution towards economic diversification in the region. Estimated attendance at the meeting was 365 persons, distributed throughout open house locations as shown below. A total of 156 questionnaires were completed, including 31 questionnaires which were mailed in by individuals who could not attend the meeting or who chose to complete the questionnaire after the meeting.

Open House	No. of Estimated Attendance	Completed Questionnaires
Invermere	60	17
Kimberley	50	21
Fernie	45	8
Creston	45	9
Grand Forks	45	27
Rossland	30	9
Nelson	90	34
Mail Ins	n/a	31
Total	365	156

The questionnaires together with the meeting notes served as the basis for reviewing the preliminary conclusions of the study team concerning tourism development in the region. Four questions were put to the public through the questionnaire:

- What are your ideas for tourism development?
- Where should the emphasis be placed in considering tourism development for the region?
- What do you feel to be the main constraints to tourism development in the region?
- Do you generally agree with the preliminary tourism strategy presented at this meeting and what comments do you have on the strategy?

6.2.1 Tourism Development Ideas

Over 200 ideas were put forward by the public for tourism development in the region. They ranged from localized suggestions, such as renovation of heritage church property, to development opportunities more regional in scope such as mining theme tours.

Open House	# of Local Ideas
Invermere	17
Kimberley	26
Fernie	17
Creston	7
Grand Forks	42
Rossland	10
Nelson	20
Mail Ins	67
Sub-total	206
Regional Ideas	30
Total	236

The ideas were classified by the study team into either "local" or "regional" ideas. The distinction between the two was based on the following criteria for regional ideas:

- potential to serve as a major regional "draw" - that is, to increase visitation to the region;
- potential to act as a major catalyst for a local community and private sector tourism development (that is, a tourism product which will generate spinoff products in tourism activities);
- potential to significantly enhance the destination orientation of the region (including capacity to increase visitor length of stay and expenditures);
- degree of fit with regional aspirations for tourism development.

The reasoning behind distinguishing between local and regional tourism development ideas rests with the mandate for this study. Specifically the objective is to identify tourism development opportunities which are a priority from a regional perspective for the region's tourism sector. A complete list of the local or

community ideas is provided in Annex 2. The regional opportunities identified during the public input process are discussed in Section 7.0 of this report.

6.2.2 Tourism Development Emphasis

In order to better understand aspirations of region residents and interest groups for tourism development, a question on where to place development emphasis was included in the questionnaire. The results show that the top three areas for emphasis as seen by the public are:

- destination related opportunities;
- backcountry opportunities;
- heritage resources.

These dominated all other responses on this question (achieving 174 mentions from a total of 264 development opportunities identified.)

No. of Mentions	Development Type
78	Destination Related Opportunities
56	Backcountry Opportunities
40	Heritage Resources
25	Services and Facilities
21	Natural Resources
20	General
16	Circle Tours
5	Attractions (increase)
2	Railway Tours
1	Cultural Tours
264	

The natural resource category shown above is distinct from backcountry opportunities in that the proposed emphasis by those respondents is on natural or wildlife interpretation. The "general" category covers comments on the process of tourism development rather than actual development ideas themselves.

6.2.3 Constraints to Tourism Development

The public's view of constraints to tourism development focused on:

- poor road and air access;
- lack of facilities and quality services (e.g., quality accommodation);
- lack of coherent planning and cooperation between communities.

These three areas received 107 mentions out of a total of 205 mentions for this question. Concerns about the lack of funding and need for better signage throughout the region received another 41 mentions. A summary of the public's response by constraint area is shown below.

No. of Mentions	Constraint Area
42	Poor road and air access
40	Lack of facilities and quality services
25	Lack of coherent planning and cooperation between communities
23	Lack of funding
18	Need for better signage
15	Shortage of trained labour
13	Resource use conflicts
8	Need for downtown revitalization
6	Lack of recognition and support by provincial government
5	General
4	Lack of attractions and cohesive destination theme
3	Poorly developed waterfronts
3	High costs
205	

6.2.4 Comments on the Tourism Development Strategy

The preliminary tourism development strategy presented by the study team at the public meetings was based on a tourism development approach with 3 main areas of emphasis:

- Implementation of regional products which can serve as a major "draw" bringing visitors to the region.
- Adoption of "theme" areas throughout the region each with an emphasis which is based on the resources of a particular area.

- Independent touring products which serve to encourage the visitor to explore the diversity of the regions attractions and/or integrate communities throughout the region from a tourism perspective.

Of those who completed questionnaires, 82 stated that they agreed with the tourism strategy, 5 expressed disagreement and 43 did not answer the question (see Exhibit 6.1). Generally speaking, the public input results demonstrated concurrence with the preliminary thinking on tourism development presented by the study team.

6.3 Implications For the Tourism Opportunity Strategy

The public input process results hold several implications for defining a tourism opportunities strategy appropriate to regional aspirations. The most important of these are discussed briefly below.

1. **There is a high level of interest in tourism development as a diversification approach by the regions, communities and interest groups alike**. This interest was reflected not only in meeting attendance and questionnaire results but also in the fact that many attendees stayed for the full 4-5 hours of each open house/public meeting. Given the enthusiasm and commitment by the region's residents, it is important that this strategy not only set a course in direction for tourism development but also address how an ongoing tourism development approach can be implemented in the region.

2. **In excess of 200 ideas were presented by the public for local tourism development opportunities**. While the study, focused as it is on regional priorities, cannot address these directly, it points to the need for a strong coordination and management mechanism to encourage communities to pursue their local ideas and their contacts with the regional strategy.

3. **The preference for a tourism development emphasis** by the public focuses on two areas:

   - The need to improve and add to the destination focus of the region.
   - The importance of building on the resource base strengths of the region, particularly in areas of backcountry experiences and heritage resources. It is noteworthy that many of the comments on the preliminary tourism opportunities strategy urged a development approach that is sensitive to both the regions natural and heritage resources as well as to resident's lifestyles.

4. **Infrastructure and product quality were seen by the majority of respondents as the key constraints to tourism development.** In particular, the quality of the highway network within the region and air access to the region were cited as the main infrastructure concerns. Respondents also observed that there is a lack of tourism facilities and, importantly, quality facilities and services offered by the tourism sector in the region. Several commented that the lack of quality and accommodation was one of the key constraints to strengthening the region's tourism sector.

EXHIBIT 6.1: RESPONSE TO PRELIMINARY STRATEGY

Open House Response	No. of Completed Questionnaires	Agree with Strategy		
		Yes	No	No Response[2]
Invermere	17	12	–	5
Kimberley	21	11	–	10
Fernie	8	5	–	3
Creston	9	6	2	1
Grand Forks	27	12	2	13
Rossland	9	6	–	3
Nelson	34	24	1	9
Mail Ins[1]	31	6	–	–
Total	**156**	**82**	**5**	**43**

Note: (1) Majority of mail ins did not see strategy presented at open house
(2) "No response" – respondent did not specify agreement or otherwise.

PART II

Tourism Development Opportunities Strategy

7.0 TOURISM DEVELOPMENT OPPORTUNITIES STRATEGY

7.1 Context

A framework for tourism development is an important tool as it provides direction on what a particular area should emphasize and promote as its tourism product. The content of the framework is based on a number of factors, including:

- the area's resource base and accompanying tourism product potential;
- the area's competitive position in the context of the markets it is attempting to serve;
- ease of access by markets to the area.

It is important that such a framework be developed to provide guidance not only to industry, but also to government. For example, government operates with limited resources and must focus it's efforts on support programs and infrastructure to encourage tourism development which offers the greatest economic benefits to a region's residents. Given the strong partnership between government and the private sector in tourism, it is all the more important that a tourism development framework be prepared that receives the support of all stakeholders and provides guidance for allocating scarce resources. Such a framework also assists the private sector in considering investments which will have the greatest chance of success.

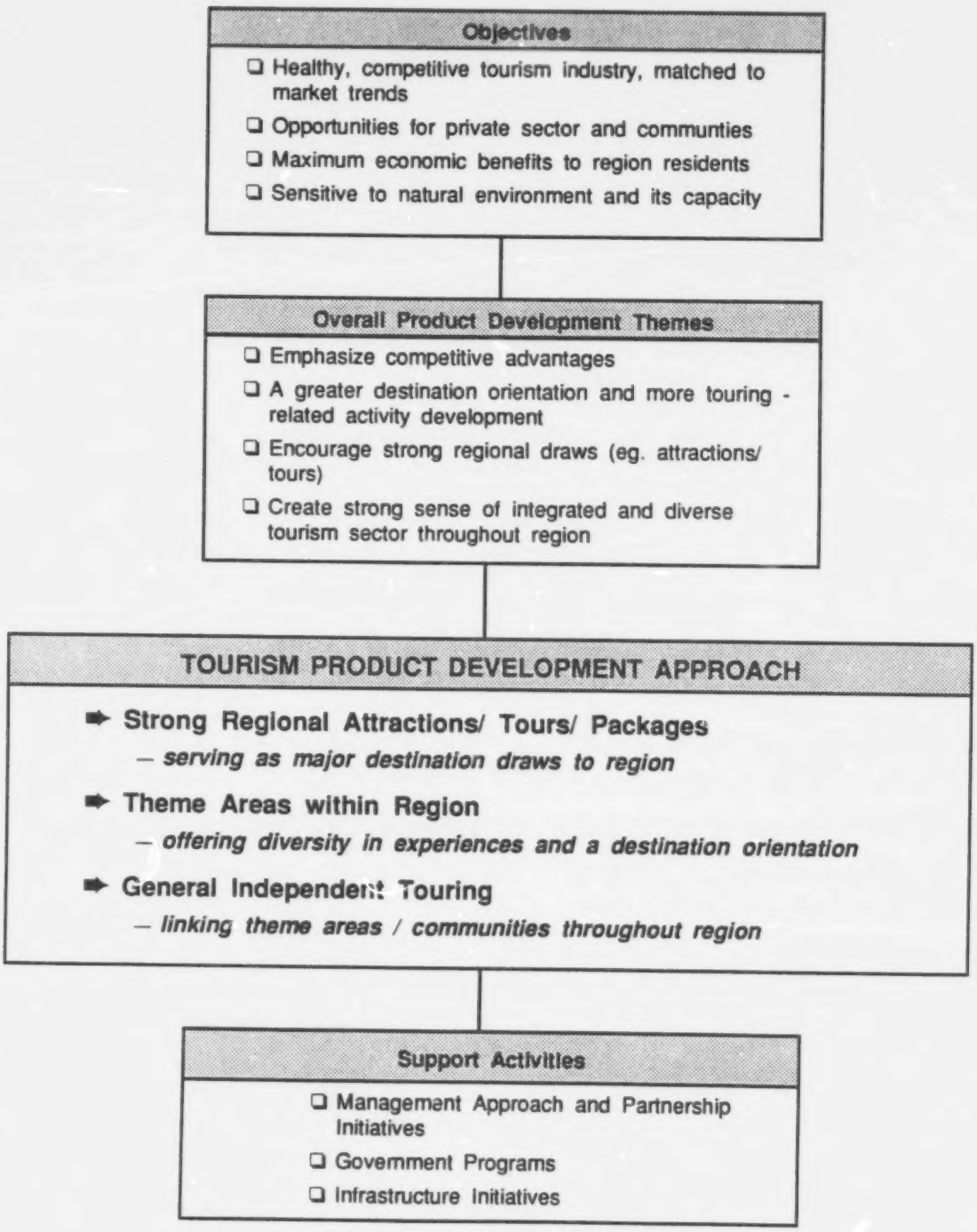
In considering a strategy for the Kootenay Development Region, one is immediately faced with the problem of dealing with a region which is geographically large, has a diverse tourism product range, and operates under specific access constraints which strongly influence tourism investment potential. Therefore, we believe that the tourism development framework must reflect the characteristics and strengths of areas within the region, in addition to addressing overall regional objectives for tourism development. Without such an approach the framework will be, of necessity, too generalized to be of much use in proceeding to identify specific development opportunities.

7.2 Proposed Tourism Development Framework for the Kootenay Region

The overall tourism development framework proposed for the Kootenay Region is summarized in Exhibit 7.1. It is structured into four main elements:

- objectives;
- overall product development themes;

Exhibit 7.1: Proposed Tourism Development Framework - Kootenay Region


Objectives
❑ Healthy, competitive tourism industry, matched to market trends
❑ Opportunities for private sector and communties
❑ Maximum economic benefits to region residents
❑ Sensitive to natural environment and its capacity
Overall Product Development Themes
❑ Emphasize competitive advantages
❑ A greater destination orientation and more touring - related activity development
❑ Encourage strong regional draws (eg. attractions/ tours)
❑ Create strong sense of integrated and diverse tourism sector throughout region
TOURISM PRODUCT DEVELOPMENT APPROACH
➨ Strong Regional Attractions/ Tours/ Packages
– serving as major destination draws to region
➨ Theme Areas within Region
– offering diversity in experiences and a destination orientation
➨ General Independent Touring
– linking theme areas / communities throughout region
Support Activities
❑ Management Approach and Partnership Initiatives
❑ Government Programs
❑ Infrastructure Initiatives

- tourism product development approach;
- support activities.

7.2.1 Objectives

Objectives for any tourism development framework must reflect the needs and aspirations of stakeholders within the region, as well as the realities of the region's product potential and likely success in the marketplace. Based on interviews which were undertaken and the secondary sources reviewed, the following objectives are recommended for the Kootenay Development Region tourism development framework:

- to create a healthy tourism sector, well-matched to market trends and competitive in the long term;
- to maximize economic benefits to region residents;
- to create opportunities for both communities and the private sector to benefit from tourism development;
- to ensure that tourism development is sensitive to the natural resources of the region and their capacity to sustain ongoing use.

7.2.2 Tourism Product Development Themes

There are certain product development themes which are consistent for all areas within the region. These themes arise from the need to ensure that tourism investment is successful on the one hand and that maximum economic benefits are achieved on the other. They are:

1. That tourism development be encouraged which has a distinct competitive advantage in the context of the region's resources and market potential;

2. That a greater emphasis be placed on developing:
   - more of a destination orientation where appropriate;
   - a greater concentration of activities to serve touring markets and encourage longer stays in the region;

3. That existing regional attractions in tourism be strengthened and new opportunities which serve to "draw" destination visitors to the region encouraged. These should be high profile products which distinguish the Kootenay Region from competitors, and provide the opportunity for linkages to other tourism activities in the region.

4. That a strong sense of an integrated and diverse tourism sector be created throughout all parts of the region.

A strong industry is one in which the market clearly understands and is attracted to the product or products which the region attempts to offer. There is little point in pursuing tourism development which is not competitive with similar product offerings by other regions. Placing more emphasis on a destination orientation or increased activity for touring markets simply reflects the added advantages that this approach can bring in terms of extending lengths of stay and generating greater tourism expenditures. It is important, however, to target a market niche which realistically reflects the resource base and locational circumstances.

This emphasis is also consistent with general market trends towards products which are more educational or experience-intensive. While the general touring vacation of the 60's and early 70's still takes place, the market is becoming increasingly sophisticated in its demands for interpretive and educational experiences -- that is, learning more about one's destination. Therefore, industry must respond to this trend in order to stay competitive and viable.

In addition to the destination orientation, it is important that the Kootenay Region be viewed generally by the market as an area offering diverse tourism experiences. This approach also accords with the aspirations of region stakeholders who generally view the region as a distinct entity with a variety of interesting products.

Tourism Product Development Approach

The proposed product development approach has been designed to build on a number of principles identified for the region including:

- to match the needs and expectations of the existing and emerging markets;
- to create strong regional attractors which "feed" other tourism products within the region;
- to recognize that there are distinct tourism theme areas having the potential to offer strong destination-oriented products;
- to establish integration through marketing/package linkages for both destination travellers and independent touring visitors to the region;
- to recognize the region's aspirations to develop its tourism sector in a more unified and comprehensive manner;
- to design an approach which ensures an easy transition to identification of specific tourism development opportunities most advantageous to the region.

In that context, the proposed product development approach includes three main components as shown in Exhibit 7.2. Major regional attractions, tours or packages serve to distinguish and profile the tourism product of the Kootenay region to national and international markets. Within the region, there are several diverse "theme" areas which have potential for greater diversification into destination products matching general tourism market trends towards greater segmentation and a desire to "experience one's destination".

Linkages between regional attractions/tours can be developed through marketing and packaging approaches to the region's tourism theme areas, thereby encouraging longer stays and greater expenditures within the region by visitors.

The final component involves attention to the independent touring visitor to the region. In particular, the approach here is to emphasize linkages between theme areas within the region and encourage the independent touring visitor to increase their intended length of stay. Marketing linkages and the identification of specific product developments which offer more activity for the touring visitor are keys to success in this regard.

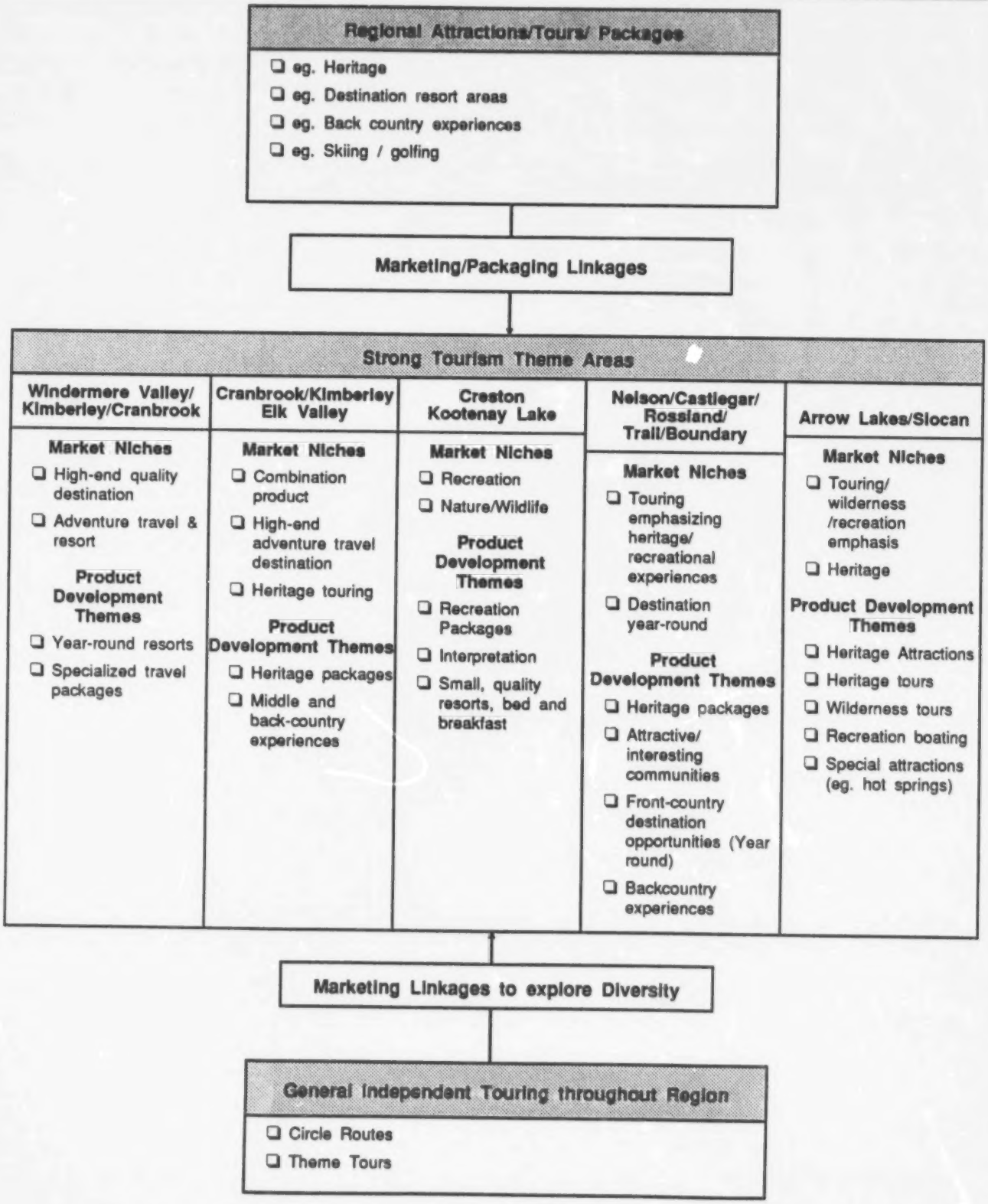
Tourism Development Theme Areas

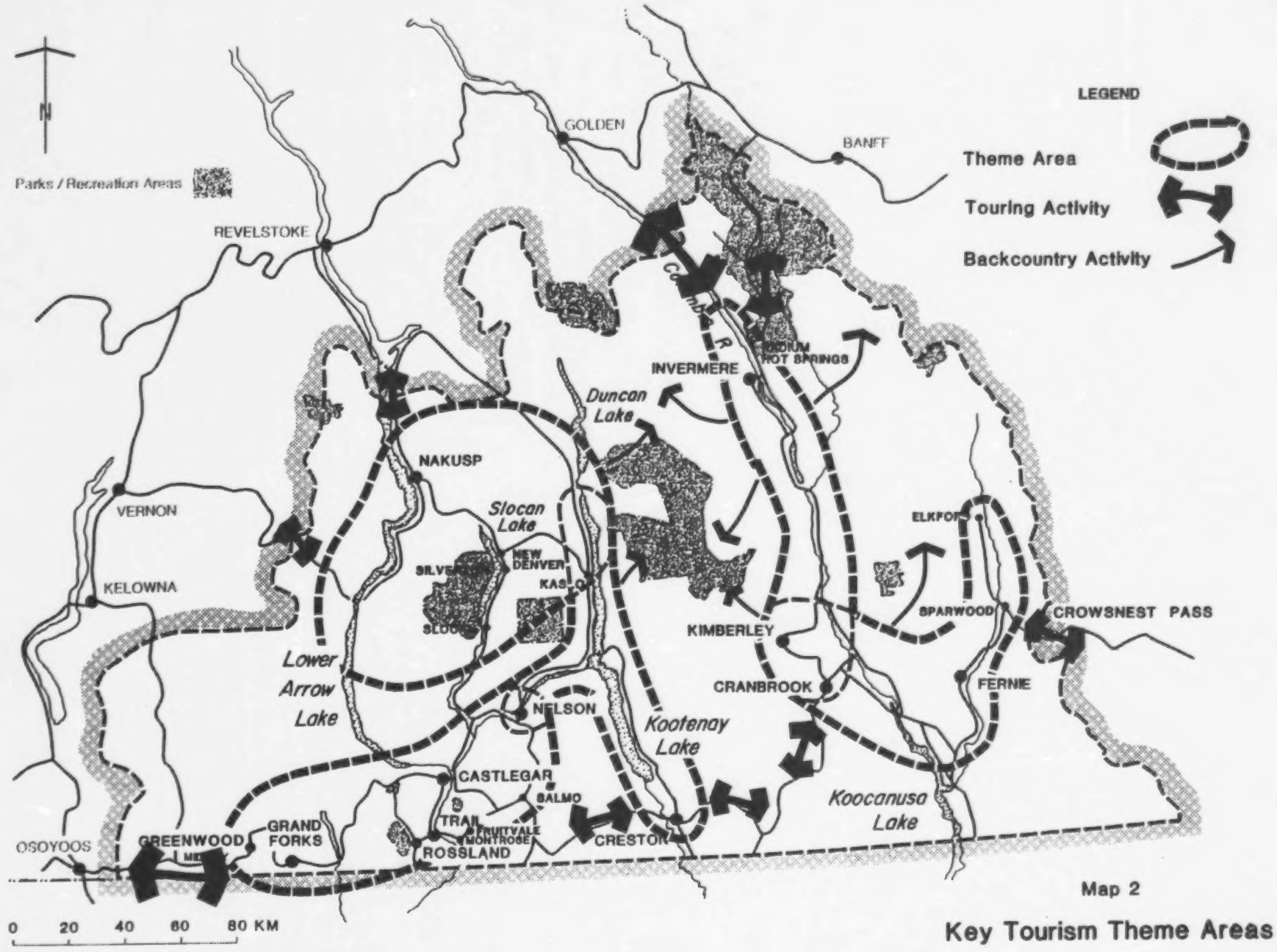
The selection of theme areas is based on a number of factors including:

- the presence of a distinct tourism product character that offers market potential for strengthening and/or creating a greater destination orientation;
- a particularly strong resource base (be it natural resources or a collection of contiguous communities) on which to build products and packages which are attractive to the market place;
- a diversity of tourism themes to encourage exploration by visitors throughout the region.

Map 2 illustrates the theme areas which are discussed below.

Exhibit 7.2: Product Development Approach Features





Map 2

Key Tourism Theme Areas

Windermere Valley/Kimberley/Cranbrook

This area of the region is characterized by two generally distinct types of products: year-round, high-quality resorts offering a variety of experiences, and sector-specific products catering to a high-end international market (e.g., heli-skiing, guide outfitting). The area's products are generally destination oriented and cater to either the Alberta (Calgary) market or to market segments interested in specific sectors nationally and internationally which access the area by air via the Cranbrook/Kimberley airport. Continued development of the high quality, year-round resort theme offers strong potential. For example, golf is an increasingly sought after activity by tourists selecting destination resorts. The strength of this area as a destination area also offers potential for related tourism product activities such as arts and culture and quality retail shopping.

Cranbrook/Kimberley/Elk Valley

This area successfully offers high-end destination packages for its adventure travel and touring products based on community and heritage/cultural resources, as well as the area's scenic beauty. The heritage attractions such as Fort Steele attract a strong touring market. The destination product component relies on market segments interested in its world-class quality and does not cater to specific regional market origins. Cranbrook/Kimberley/Elk Valley can build on the market profile and strength of the Windermere Valley destination product in pursuing its own distinct destination theme. For example, by emphasizing year-round destinations with access to heritage attractions in the immediate area, the Kootenay Lakes area, and adjacent backcountry areas, there is certainly potential to diversify and strengthen the tourism sector.

Creston/Kootenay Lake

Strong recreational and natural resources provide an opportunity to build a distinct theme related to the summer touring market. Strengthening current efforts for wildlife/natural interpretation offers the potential for attracting more visitors and new market segments specifically interested in these features. The extensive recreational resources, with Kootenay Lake as the centre-piece, lends strength to this area as a summer destination.

Nelson/Castlegar/Greater Trail/Rossland/Boundary

This area's market niche emphasizes a winter season destination focus and touring with a strong activity base in such product areas as heritage and recreational experiences. Of all areas within the region, it is most hampered by accessibility problems and draws a large portion of its market from the Spokane area. While there are some high-end destination products which do not rely on close-in markets, the tourism sector in this area clearly caters, for the most part, to close-in markets and pass-through touring. The high-end destination product currently caters primarily to the winter, and more specifically, ski market. By developing shoulder and summer season markets, these resort areas could act as major draws to the region as a whole.

This area has a strong community base and substantial heritage resources offering the potential to serve is one of the heritage centres of the region. Linking the communities with other heritage resources within the region, Cranbrook to the east and Slocan to the north creates opportunities for heritage packages.

Arrow Lakes/Slocan Valley

The Arrow Lakes area is now largely oriented to scenic touring and recreational boating. It does not have a strong network of communities or a well-developed outdoor/sport/adventure travel product and is hampered by what some view as inadequate highway facilities. Moreover, recreational opportunities are severely hampered by changing water levels in the Arrow Lakes reservoir -- not an inducement to major private sector development. Nevertheless, this area offers strong backcountry potential, as well as many features of interest to independent touring visitors.

The Slocan Valley, including the communities of New Denver, Silverton and Slocan, shares many of the same features of the Arrow Lakes. It has an important water resource, Slocan Lake, potential for backcountry activities and, like the Arrow Lakes, has a strong mining/heritage theme throughout the valley of interest to touring travellers. The conditions of the highways are considered a constraint to growth in this region.

7.3 Regional Tourism Development Opportunities

Two main sources were used for identification of regional tourism development opportunities:

- analysis of the region's current products and markets and existing resource base;
- input from the public, communities, and interest groups.

The importance of public input cannot be overstated. The public meetings provided an excellent forum for the exploration of tourism development ideas - both local in scope as well as regional. They also provided valuable insight into the areas of emphasis which the public believed to be important for ongoing tourism development in the region.

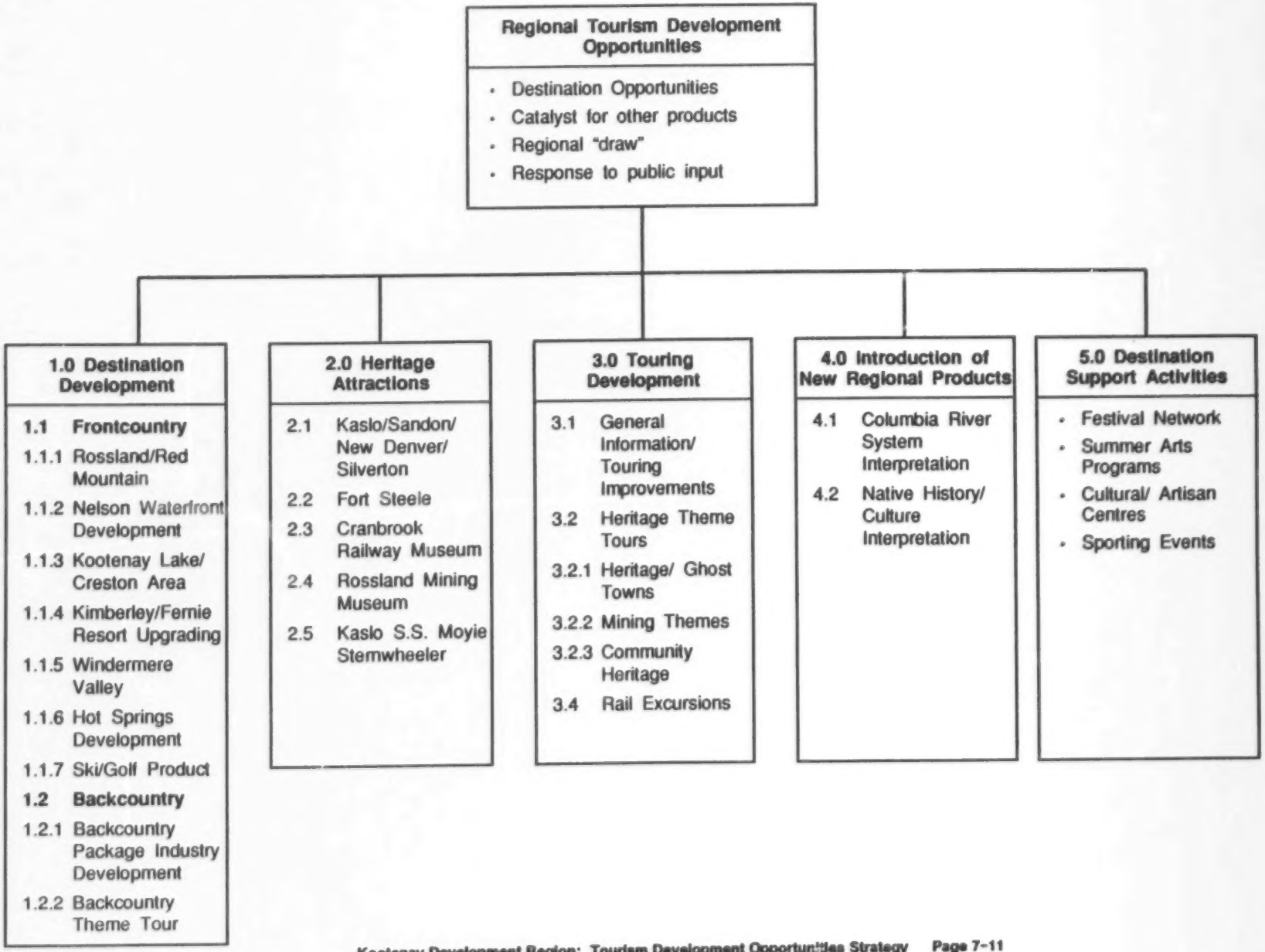
In selecting regional opportunities, the study team employed several criteria as follows:

- potential to serve as a regional draw;
- potential to act as a major catalyst for local community and private sector tourism development;
- potential to enhance the destination orientation of the region's tourism sector;
- degree to which the opportunity meets regional aspirations.

Some restructuring of the many tourism development ideas was required in order to define opportunity "packages". The main purpose of the restructuring was to draw out key themes with destination potential, and specifically define the nature of the tourism product in a manner that can readily lead to implementation. A total of 30 regional opportunities were identified initially for review by the Task Force on Parks, Recreation and Tourism (see Annex 3). All opportunities support a destination orientation for the region in one form or another and have been classified into five general categories (see Exhibit 7.3):

- **Destination Development** - focused on improving the quality of high end "anchor" accommodation facilities that will serve as a catalyst for local tourism development and/or building on the existing strengths of the region's resource base.
- **Heritage attractions** reflecting the priority placed by the public on this category in the survey which focused on the development of a strong heritage product in the Lardeau and Slocan areas, complimented by attention to maintenance and marketing support for existing heritage attractions which serve as "anchors" from a regional perspective.
- **Touring products** - designed to build on the strength of the region's resource base and encourage the visitors to explore the diversity of the region.
- **Introduction of major new regional products** - that serve as major regional draws and are "interpretive" in nature, reflecting the public preference for development emphasis.
- **Destination support products** - that are designed to assist in "holding" visitors once they arrive in the region.

Exhibit 7.3: Regional Tourism Development Opportunities



A brief discussion of each of these categories is provided below:

Destination Development

This group of opportunities was divided into three general categories: frontcountry, backcountry, and heritage attractions. The emphasis in the frontcountry opportunities is generally on the development of high quality, "anchor" accommodation facilities that can serve as staging areas for visitors to explore the region in the form of activities such as backcountry experiences, heritage tours, mining tours, or recreation activities such as skiing, golfing and boating. The main focus in terms of high quality and accommodation is on:

- the Nelson waterfront area - the Water's Edge proposal for a 70 unit hotel;
- a resort area including hotel and condominium units in the Rossland/ Red Mountain area;
- resorts associated with hot springs (both new development and upgrading existing development);
- upgrading resort accommodation at Kimberley and Fernie.

In the case of the Kootenay Lake area, the recommended emphasis is on smaller quality inns/resorts/bed and breakfast facilities which can take advantage of lakeshore locations and encourage exploration of the Kootenay lake, as well as other areas throughout the region. Supporting activities for the Kootenay Lake include improvements in recreation facilities, enhancement of boat touring opportunities, and upgrading of interpretive facilities based on the many resource based possibilities throughout the Kootenay Lake area.

The ski/golf product is, and continues to be, a major attraction for the Kootenays. Here, the intent is to continue support of this product area through assistance in establishing new markets, upgrading existing products where appropriate, and encourgaging diversification in areas such as the Windermere Valley to provide more water-based recreation activities.

The region's resource for backcountry experiences is one of the best in North America. The recommended focus here is on education and support programs to encourage the local operators, and potential operators in the region to develop backcountry experience packages. While there are some excellent existing products in this area, the potential exists to develop, not only multi-day experiences, but also "day trips" where the customer would stay at a quality resort. One specific development opportunity related to the backcountry experience is the development of a (rubber tire) tour with a backcountry theme on the summer road connection from Kimberley to Gray Creek in the south and a proposed road connection, Jumbo Pass,

in the north. This is recommended as a circle tour where the two east/west road links are summer roads only, providing limited access to backcountry resources and offering interpretation through signage at day use areas. A further advantage of this tour is its potential for linking theme areas in the region.

Heritage Attractions

Heritage attractions are an important regional feature in the Kootenays. Those who wish to increase visitation to the region and experience reasonable to large attendance, should be encouraged to maintain and upgrade their product. A frequent comment during the public input process was the difficulties which all museum and heritage facilities in the region experience in terms of financing and seasonal variations in revenue levels. Efforts to assist these facilities with their marketing and stabilizinig of their operations is an important regional priority.

In the case of the Sandon/New Denver/Silverton/Kaslo area there is an opportunity to develop a strong regional heritage product that broadens the scope of the region's overall heritage resources and serves as an anchor for heritage tour development.

Touring Development

There are a variety of regional opportunities available to enhance and develop touring products in the region, which will serve to integrate and encourage increased length of stay and expenditures. Many of the open house participants identified signage, tourism information booths, border crossing hospitality and the like, as requiring attention. As these opportunities are all integrally related with circle routes and inter-regional touring linkages, it is appropriate to consider the whole package as one regional development opportunity.

The area is rich in heritage resources and attractions. Themes include the natural environment, mining, and community development. Developing heritage theme products for touring can serve both destination markets (e.g., day trips) and the touring traveler. The Kaslo/Sandon area offers two opportunities - a northern circle route utilizing highways 31, 23, and 31A and a southern route utilizing highways 31, 31A, 6 and 3A. The northern route in particular offers the potential for broadening the strength of the overall heritage product in the region and, therefore, adding more punch to marketing the region in that context. There, for instance, a ghost town theme can be pursued that will be of interest to many specialized markets segments. Tours with mining themes in both the southeastern and southwestern portions of the region offer regional opportunities and can serve to draw visitors from outside the region. They are not necessarily all heritage in nature. For instance, one can build on the tours already offered by the Cominco Smelter at Trail to incorporate a "walk through time" of the region's mining sector.

Community heritage can also serve to diversify the region's product and offers potential for day trips. The most immediate opportunity with the greatest product strength lies in the Kaslo, Nelson, Castlegar, Trail, Rossland, Grand Forks, Midway and Greenwood area.

Introduction of Major New Regional Products

Two new regional products are proposed for the Kootenay region. Each can have a significant impact on the region's ability to attract both new markets and improve their capture rate of existing markets.

The Columbia River System project emphasizes interpretation of prehistory, navigational history, existing hydroelectric dam network and modern day use, anchored by the development of a major interpretation center. The product can incorporate tour development (both water and road), auxiliary recreation facilities and day use areas, and the introduction of new interpretive displays at key locations throughout the system.

The Kootenay Development Region, is endowed with internationally significant prehistory sites such as alpine game drives, rock art, mines and other prehistoric sites. The Top of the World area includes approximately 20 of these sites which will be investigated in more detail by a archeological team in the summer of 1990. There is a major tourism product potential here which, subject to the archeological investigations, can attract international markets. The success of Alberta's sites of a similar nature are evidence of this potential.

Destination Support Products

In seeking to enhance the region's destination product, it is important to consider supporting activities for visitors. Events and activities such as community festivals, summer arts, theatre programs, sporting events and the introduction of artisan centers, all can help to broaden the region's tour product and provide visitors with evening activities and shopping opportunities.

7.4 Selecting Regional Priorities

In a workshop meeting with the Task Force, the opportunities were refined and priorized to yield:

- 11 regional priorities for immediate action;
- 10 regional opportunities, that though not considered for immediate action, should be pursued as next steps after implementation processes are well advanced for the priorities.

The workshop priorization process was based on an evalution of each opportunity using the following criteria:

- consistency with the development strategy and theme areas;
- strength of the regional "draw" ;
- catalyst for developing other tourism products;
- ability to increases length of stay;
- ability to increase expenditures;
- investment costs.

A full description of the evaluation process and Task Force deliberations is provided in Annex 3. An overview of regional tourism development opportunities is shown in Exhibit 7.4.

EXHIBIT 7.4: REGIONAL TOURISM DEVELOPMENT OPPORTUNITIES

1.0 DESTINATION DEVELOPMENT

1.1 Front Country

Emphasis: Enhance and build on existing strengths. Improve quality of accommodation

***1.1.1 Rossland/Red Mountain**

-Develop strong base facilities
-Resort/condominium units
-Strong summer diversification
-Package development

***1.1.2 Nelson Waterfront Development**

-Marina/hotel/waterfront public access

***1.1.3 Kootenay Lake/Creston area**

-Improve recreation facilities
-Encourage small quality inns/resorts
-Boat touring
-Enhance interpretation facilities
-Expand Wildlife area tourism season

***1.1.4 Upgrade Resort Accommodation - Kimberley/Fernie**

-Summer activity diversification
-Strengthen family market orientation

1.1.5 Windermere Valley

-Enhance destination area with more water-based recreation activities/public assess
-Facilities and services to support destinations, local crafts, retail.

1.1.6 Hot Springs Development

-Encourage development of undeveloped sites as attractions with ancillary resorts where appropriate (e.g., Halcyon)
-Encourage ancillary supporting development for existing facilities

1.1.7 Ski/Golf Product

- Establish new markets
- Upgrade existing product
- Design/implement support program

* Indicates regional priority item as determined by Task Force on Parks, Recreation and Tourism.

EXHIBIT 7.4: REGIONAL TOURISM DEVELOPMENT OPPORTUNITIES (cont'd)

1.2 Backcountry

Emphasis: Backcountry package experiences

***1.2.1 Education/Training/Marketing Seminar Program**
For backcountry package development and linkage approaches to front country development encourage/participate in resolution of backcountry policy.
-Investigate funding program potential for backcountry products.

***1.2.2 Backcountry Theme Circle Tour**
- St. Mary and Jumbo Pass/Lardeau Valley area

2.0 HERITAGE ATTRACTIONS

Emphasis: Build on existing strengths/improve and upgrade regional attractions

***2.1 Kaslo/Sandon/New Denver/Silverton**

2.2 Fort Steele

2.3 Cranbrook Railway Museum

2.4 Rossland Mining Museum

2.5 Kaslo S.S. Moyie Sternwheeler

3.0 TOURING DEVELOPMENT

Emphasis: Developing touring experiences capable of drawing visitors to region and linking communities/attractions/theme areas

***3.1 General Information Improvements**

Signage/Information

-Prepare and implement integrated signage focusing on communities
-Develop tourist information centres
-Border crossing hospitality and information improvements
-Gateway signage program at entry points to the region

Circle Tours

Emphasis: Regional diversity and breathtaking scenery

-Highway 3/93 from Alberta/U.S.
-Highway 23/6 linking Highway 1 to Spokane

* Indicates regional priority item as determined by Task Force on Parks, Recreation and Tourism.

EXHIBIT 7.4: REGIONAL TOURISM DEVELOPMENT OPPORTUNITIES (cont'd)

Inter-Regional Linkage Tours

Emphasis: Inter-regional co-operation and co-ordination

-Sparwood/Elk Valley/Alberta
-Arrow Lakes - Kettle Valley - Penticton
-Radium - Alberta
-Windermere Valley - Golden
-Cranbrook - Kingsgate - Spokane
-Grand Forks - Cascade - Colville

3.2 Heritage Theme Tours (Rubber-Tire)

Emphasis: Strong interpretation content with regional heritage attraction as "anchor".

***3.2.1 Heritage/Ghost Town and Related Themes**

- Kaslo/Sandon area

-Highways 31, 31A, 6, 3A
-Highways 31, 23, 31A

***3.2.2 Mining Themes**

-Kimberley and Elk Valley (Fernie, Sparwood, Elkford)
-Grand Forks, Midway, Greenwood, Rossland, Trail, Kaslo, Sandon

3.2.3 Community Heritage

-Nelson, Castlegar, Trail, Rossland, Grand Forks, Greenwood, Kaslo

3.4 Rail Excursions

Emphasis: High end regional draws

Cranbook/Kimberley/Fort Steele

-Excursion/heritage

Burlington Northern

-Excursion

Nelson - Creston

-Scenic lakeside tour

Kettle Valley

-Scenic tour

* Indicates regional priority item as determined by Task Force on Parks, Recreation and Tourism.

EXHIBIT 7.4: REGIONAL TOURISM DEVELOPMENT OPPORTUNITIES (cont'd)

4.0 INTRODUCTION OF NEW REGIONAL PRODUCTS

Emphasis: Interpretation of the region's resource base to create major new products with spin off benefits throughout region.

***4.1 Columbia River**

Emphasis: Interpretation of prehistory, geology, navigational history, dams, and modern day use

Site Development/Interpretation

-Access
-Tour development (water and road)
-Interpretative centre
-Ancillary recreation

***4.2 Native History/Culture Interpretation (Ecomuseum, South-East Kootenays)**

Site Interpretation/Development

-Alpine game drives
-Rock art
-Prehistoric mines, sites

Tour Development – guided tours

***5.0 DESTINATION SUPPORT ACTIVITIES**

Emphasis: Events/experiences conveying the region's culture/heritage and providing activities

Festival Network

-encouraging summer festival scheduling amongst communities

Summer Arts Programs

-Community-based summer evening programs

Cultural/Artisan Centres

-Building on cultural activities identified in the 1989 study encouraging artisan centre or centres (retail outlets) which are regional in focus

Sporting Events

* Indicates regional priority item as determined by Task Force on Parks, Recreation and Tourism.

PART III

Implementation Package

8.0 ORGANIZING FOR IMPLEMENTATION

Tourism development offers significant potential for economic diversification. Both the Kootenay Region Task Force on Parks, Recreation and Tourism and the Ministries of Regional and Economic Development and Tourism recognize this and have initiated preparation of a tourism development opportunity strategy. In considering the process of implementation, it is clear that there is a deficiency in the current institutional framework. In order to organize more effective implementation, an institutional structure must be established which enables a cooperative and coordinated approach between the region's tourism interests and government at both the provincial and federal level.

8.1 Needs Assessment

At the present time tourism development support is not delivered on a regional basis by the Ministry of Tourism. Enhanced tourism development throughout the province has been encouraged through initiatives which are specific to particular sectors (e.g., adventure travel), and through funding mechanisms such as the Tourism Development Agreement. At the community level, the Ministry delivers a Community Strategies program aimed at increasing awareness of tourism potential and providing assistance to the communities in identifying tourism development priorities.

The Ministry of Tourism issued a series of regional tourism planning reports to each of the economic development regions in 1989. The intent was to encourage regional Task Forces to consider tourism planning and priority setting as part of their deliberations on ways and means to diversify their region's economy. The Kootenay Region Task Force on Parks, Recreation and Tourism responded to this in their request for assistance to prepare a tourism opportunities strategy – this report. Now that the strategy is completed and priorities selected for tourism development, there remains the question of the implementation process. Deficiencies in the current structure must, therefore, be addressed, for example:

- there is no clear mechanism for managing ongoing tourism development initiatives on a regional basis, that is, there is no single agency with a mandate to implement regional tourism priorities;
- there are no coordination mechanisms for encouraging locally, or community based tourism development in a regional context, that is, local tourism development should take advantage of linkages to regional tourism priorities;
- marketing programs supported by the province are not necessarily structured for consistency with a regional tourism development approach. Specific marketing support to further regional tourism priorities is required in addition to present programs.

It is important, therefore, that an institutional framework be developed to ensure that management of ongoing tourism development - using tourism development opportunities strategy as a starting point, take place.

Given the absence of current mechanisms, it is recommended that a "pilot" project to address this need be implemented as set out below. Although the recommendations for managing the tourism development process described herein are designed specifically to address the institutional issues identified, it is recognized that there will be a time of refinement and adjustment required, as with any new process.

In that context, the objective of this pilot program is to demonstrate and test the recommendations below to determine the most effective means of delivery of this tourism development approach.

8.2 Overall Philosophy

Two important factors have been kept in mind in considering the institutional approach to the Kootenay Development Region Tourism Opportunities Strategy. These are:

- that the study only represents a starting point for a process of tourism development in the region;
- that private sector investment in tourism development will be maximized if a supportive environment is put in place with clear directions on regional priorities and mechanisms with which to encourage private sector investment.

8.3 Functional Requirements for the Institutional Framework

There are three general functional requirement areas which the institutional framework must address.

1. Pursuit of regional tourism development opportunities.
2. Tourism development support initiatives, i.e.,
   - integrated land use planning;
   - coordination of community tourism plans and aspirations with regional tourism development context;
   - focused marketing initiatives reflecting regional priorities;
   - education and related initiatives to enhance operator understanding of emerging market trends, tourism packaging strategies, etc;
   - financial institution educational and awareness programs;
   - heritage resource management.
3. Infrastructure initiatives, i.e.,
   - road development and upgrading of existing roads;
   - airport upgrading;
   - water and sewer.

8.4 Institutional Issues

The institutional framework must be designed so as to resolve several issues related to the need for formal and focused ongoing tourism development programs. Some of the key issues include:

- the role of government and the Task Force in pursuing private sector tourism opportunities (that is, encouraging and seeking private sector investment on the one hand and ensuring that a supportive environment for tourism development is available on the other hand);
- inter-agency coordination and cooperation;
- the need for "regional champions" to ensure commitment to ongoing and integrated tourism development in a regional context (that is, the role of the Task Force after completion of this study);
- coordination with the local tourism development aspirations of communities and with such programs as Community Futures and the Ministry of Tourism Community Strategies;
- "speaking on behalf of" tourism in land use planning issues (e.g., commercial backcountry uses).

8.5. Guiding Principles for the Institutional Framework

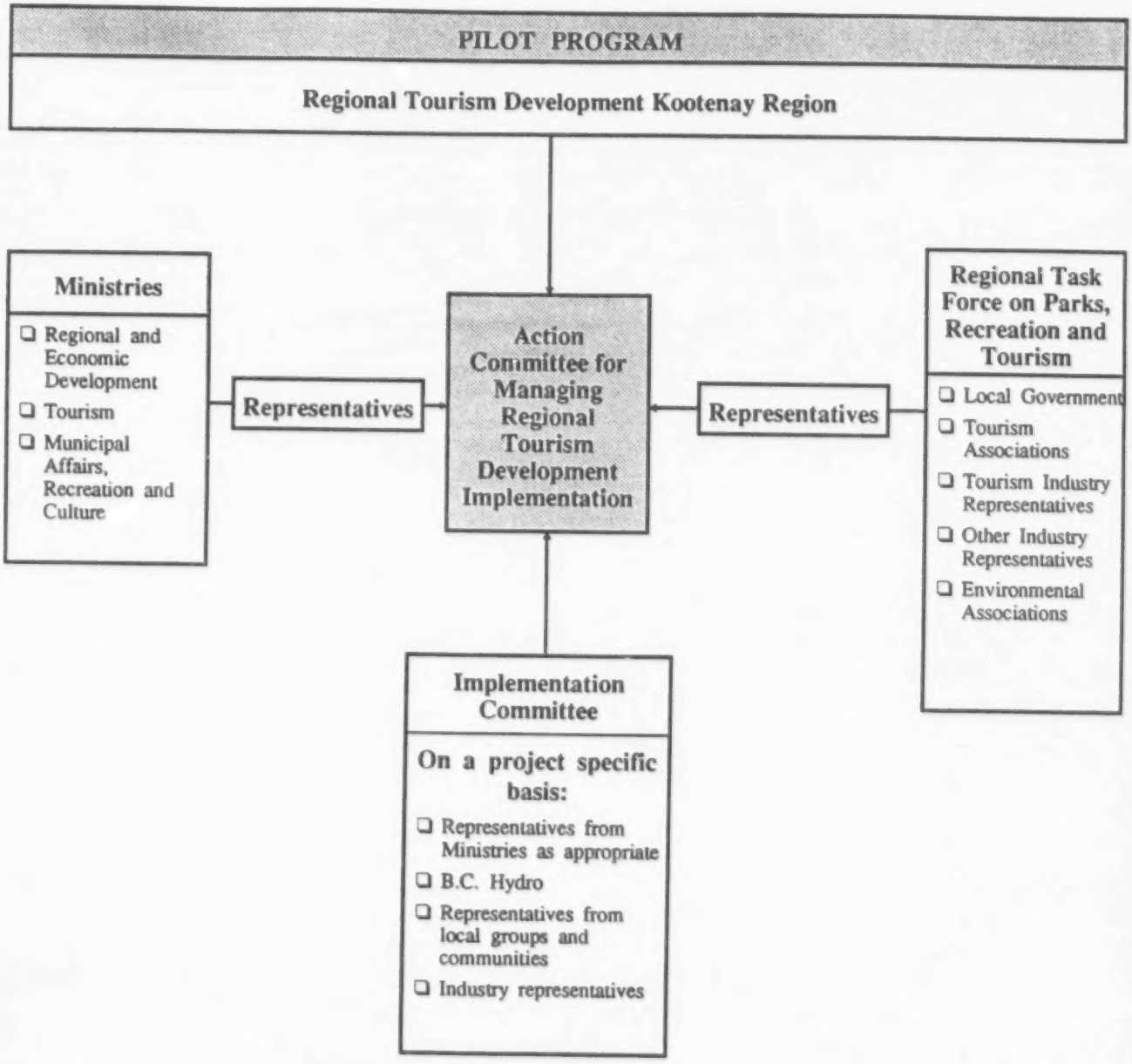
Three guiding principles are suggested to ensure a comprehensive institutional framework for ongoing tourism development. These are:

1. A management function
   - to promote and coordinate a regional tourism development program;
   - to identify and establish roles and responsibilities for priority projects;
   - to coordinate community and provincial activities;
   - to establish implementation programs (schedules and performance targets) including tourism action plans, and tourism development support initiatives.
2. A monitoring and evaluation function
   - formal milestone and review mechanisms
3. Delivery mechanisms
   - assigning roles and responsibilities for specific aspects of the tourism development planning and implementation process.

8.6 Recommendations

The following recommendations (summarized in Exhibit 8.1) have been developed based on the foregoing identification of issues and guiding principles.

Exhibit 8.1: Institutional Structure



8.6.1 Pilot Project

Establish the Kootenay Development Region as a pilot program for implementing an ongoing tourism development program for an initial three years with annual reviews.

8.6.2 Management/Monitoring

1. Encourage the Task Force on Parks, Recreation and Tourism to assume the role of "regional champion" for ongoing tourism development. Given the size of the Task Force (25 members), it should appoint a sub-committee who would meet on a more regular basis and who would interact with various tourism interests throughout the region.

2. Establish an Action Committee in accordance with the needs and objectives for managing tourism development in the region. This committee would be structured generally as follows:

   - membership
     - Sub-Committee of the Kootenay Region Task Force on Parks, Recreation and Tourism;
     - Ministry of Municipal Affairs, Recreation and Culture, Heritage Conservation Branch;
     - Ministry of Regional and Economic Development;
     - Ministry of Tourism.
   - general functions
     - managing the tourism development process in the region;
     - coordinating with other government agencies (both provincial and local);
     - carrying out the necessary monitoring of the tourism development process;
     - assigning roles and responsibilities specific to various aspects of the tourism development process.

3. In accordance with the "pilot program" spirit of this tourism development planning process, allocate sufficient resources to the process to ensure that the Action Committee can function effectively and efficiently. Such allocation should be reviewed annually as part of the formal evaluation mechanism recommended in item 5 below.

4. Develop Terms of Reference for, and establish an "Implementation Committee" which includes government Ministry representatives with whom the lead ministries (Regional and Economic Development, Municipal Affairs and Tourism) can interact on an "on call" basis to identify and resolve issues related to implementation and funding, exploring new initiatives, and informing ministries of progress on ongoing tourism development.

The Implementation Committee representation should include:

- Parks;
- Forests;
- Environment;
- Transportation and Highways;
- Crown Lands;
- Social Services and Housing;
- Local Government
- Mines, Energy and Petroleum Resources

On a project specific basis, the Implementation Committee also could include representatives from industry, from other agencies (e.g. B.C. Hydro), from local groups and associations.

5. Establish a formal evaluation mechanism - in the form of an annual report to the Task Force, public, and the provincal government reporting on progress and describing next steps.

8.6.3 Delivery Mechanisms

1. Assign the Action Committee the task of confirming roles and responsibilities for implementation as generally set out in the Kootenay Development Region Tourism Opportunities Strategy Report.

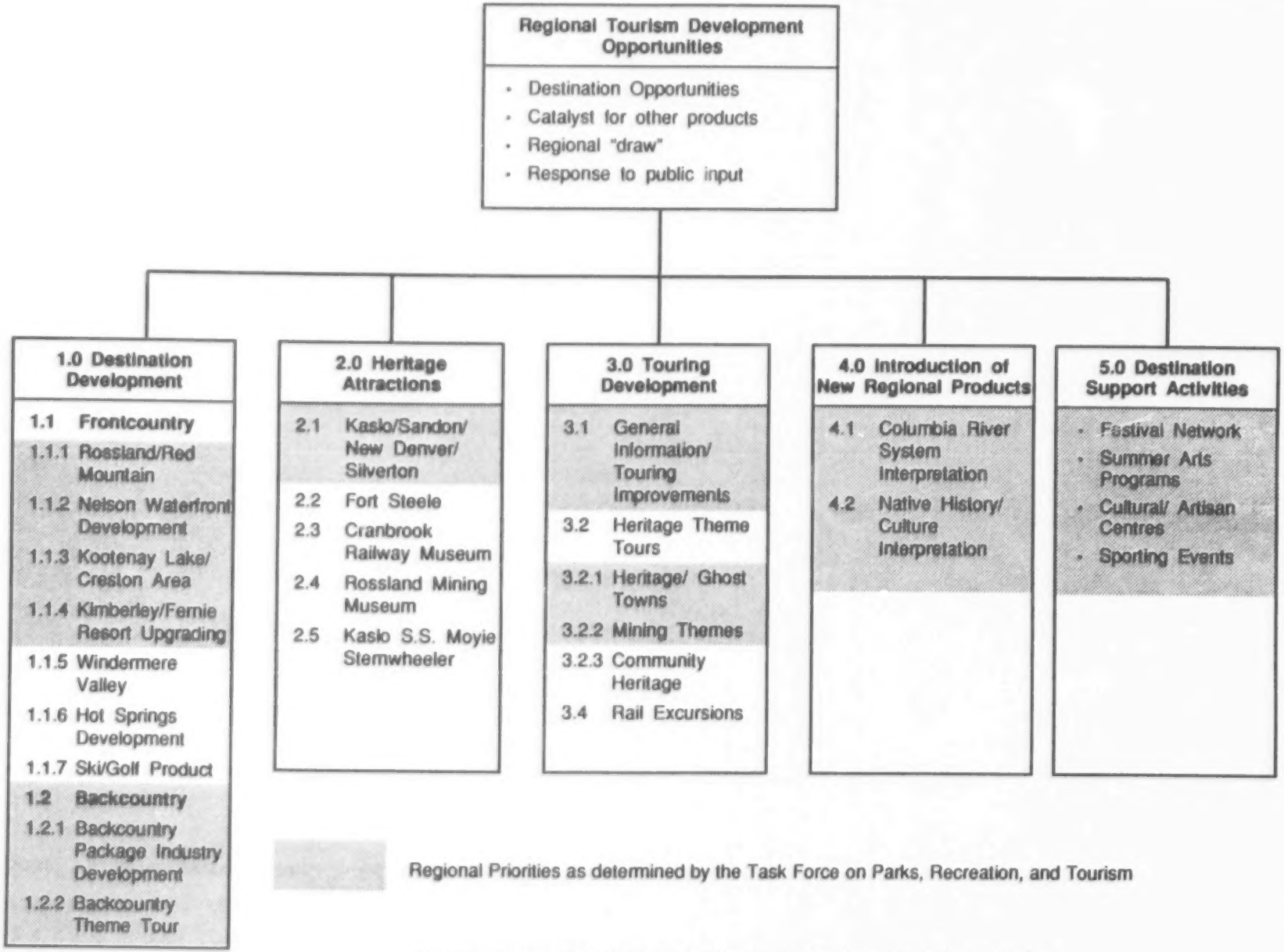
9.0 PRIORITY REGIONAL TOURISM DEVELOPMENT OPPORTUNITIES -ACTION PLANS

In this section, detailed descriptions are provided for each of the priority development opportunities approved by the Task Force on Parks, Recreation and Tourism. These are shown in summary form in Exhibit 9.1. The descriptions include:

- definition of the development opportunity;
- major implementation activities;
- benefits to the region; and
- action steps.

The action steps accompanying each priority opportunity provide a blueprint for implementation by the Action Committee identified in Section 8.0 of this report. The role of the Action Committee is discussed in more detail in Section 11.0 of this report - Implementing Regional Tourism Development Priorities.

Exhibit 9.1: Regional Tourism Development Opportunities


Regional Tourism Development Opportunities
• Destination Opportunities
• Catalyst for other products
• Regional "draw"
• Response to public input
1.0 Destination Development
1.1 Frontcountry
1.1.1 Rossland/Red Mountain
1.1.2 Nelson Waterfront Development
1.1.3 Kootenay Lake/ Creston Area
1.1.4 Kimberley/Fernie Resort Upgrading
1.1.5 Windermere Valley
1.1.6 Hot Springs Development
1.1.7 Ski/Golf Product
1.2 Backcountry
1.2.1 Backcountry Package Industry Development
1.2.2 Backcountry Theme Tour
2.0 Heritage Attractions
2.1 Kaslo/Sandon/ New Denver/ Silverton
2.2 Fort Steele
2.3 Cranbrook Railway Museum
2.4 Rossland Mining Museum
2.5 Kaslo S.S. Moyie Sternwheeler
3.0 Touring Development
3.1 General Information/ Touring Improvements
3.2 Heritage Theme Tours
3.2.1 Heritage/ Ghost Towns
3.2.2 Mining Themes
3.2.3 Community Heritage
3.4 Rail Excursions
4.0 Introduction of New Regional Products
4.1 Columbia River System Interpretation
4.2 Native History/ Culture Interpretation
5.0 Destination Support Activities
• Festival Network
• Summer Arts Programs
• Cultural/ Artisan Centres
• Sporting Events
Regional Priorities as determined by the Task Force on Parks, Recreation, and Tourism

PRIORITY OPPORTUNITY: **1.1.1 Rossland/Red Mountain**
CATEGORY: **Destination Development**
CATEGORY EMPHASIS: **Enhance and Build on Existing Strengths. Improve Quality of Accommodation.**

OPPORTUNITY DEFINITION

The Rossland/Red Mountain Ski Complex currently serves ski markets drawn primarily from the region and the Spokane area. The presence of this tourism infrastructure offers the opportunity for:

- diversifying into stronger summer tourism activities (e.g., hiking, mountain biking, historic tours, scenic tours, etc.);
- serving as a "staging area" or "base" for summer tour activities and packages.

From a tourism development standpoint, the major constraint is the lack of high quality accommodation in a natural setting. While there are several hotels/motels in the immediate area of Red Mountain, most are small and do not provide the level of quality desirable for the market segments interested in summer outdoor/adventure packages. Improving the quality of accommodation will also help to strengthen the attraction of this area as a destination ski area.

To create a strong year round destination, several development activities must take place including:

- encouraging the development of high quality accommodation and long term residential units (e.g., condominiums) at the base of Red Mountain;
- refining the Red Mountain base facilities plan to reflect this approach;
- encouraging the development of an industry infrastructure for local summer activities and tour packages;
- resolving infrastructure constraints to enable this development.

The Rossland/Red Mountain facility can serve as a staging area for a variety of summer activities including:

- backcountry experiences:
  - hiking;
  - mountain biking;
  - wildlife viewing;

- heritage experiences:
  - heritage tours to Greenwood, Midway and Grand Forks;
  - tours to Nelson;
  - circle route tours;
  - tours to new regional products (Columbia River System Interpretation)
- recreational activities:
  - tour packages to Kootenay Lake via Nelson;
  - exploration of Arrow Lakes.
- industrial tourism:
  - smelter tours in Trail;
  - forestry.

The key to this opportunity is building on the winter skiing product which is already well established. The facility will also be centrally located relative to nearby communities (Grand Forks, Midway and Greenwood to the west and Nelson, Castlegar, Trail to the east), thereby facilitating tourism diversification such as day tours.

In addition to the ski markets of Rossland/Red Mountain, the area can attract specialized segments seeking backcountry adventure with the resort as a base, heritage tours, and general resort vacations in a scenic setting. This opportunity can also serve to encourage touring visitors to stay longer in the region, thereby increasing expenditures.

MAJOR IMPLEMENTATION ACTIVITIES

Facility Planning

There is already a base facilities plan for the Red Mountain area. This plan should be revisited and refined to reflect the general opportunities definition described above. In particular, the base facilities plan should be assessed against the intent to encourage the development of quality resort and condominium units which are oriented, not only to the existing market, but also to the summer market potential.

Infrastructure

This tourism development opportunity cannot be realized without resolution of the water and sewer service to the Red Mountain base area. The most recent study showed an estimated capital requirement (in 1990 dollars) of about $3 to $4 million for completion of this infrastructure. A study is currently underway by Rossland to refine these estimates and seek innovative financing strategies for implementation. At the present time, it is understood that Rossland is investigating a financing approach that contemplates:

- a combination of local improvement charges to the developer and to the residential lands"opened up" by the introduction of underground services;
- financing participation by the community itself and the regional district;
- some assistance from the Government of British Columbia.

The Action Committee will need to liaise with Rossland to resolve infrastructure questions.

Tourism Infrastructure

The main shortfall at this time is the absence of specific packages which can be conducted from the Red Mountain proposed resort area. The resource base is generally superb and the opportunities for a variety of packages and activities is within reach. For example, packages/activities could be offered in the following interest areas:

- heritage;
- mountain biking;
- hiking;
- tours to Kootenay Lake;

Education of existing and potential operators in the area will be necessary tc encourage the development of packagers, and partnership with communities will be necessary to ensure access to the various tourism resources on a formal basis.

BENEFITS TO THE REGION

Rossland/Red Mountain is well positioned to serve as a "hub" destination area for the following reasons:

- the area already functions well as a winter tourism destination area - largely for the Spokane market - and one can build on this strength;
- there is already a network of nearby communities offering a variety of activities which can increase length of stay and help sell this opportunity as a "staging area";
- the scenic value of the area epitomizes the mountainous scenery typical of the Kootenay Region;
- back and frontcountry outdoor experiences are available within one hour's travelling time from Red Mountain.

The introduction of this tourism development opportunity will not only benefit Rossland, but also nearby communities and tourism operators by virtue of the function of this opportunity as a major "regional draw" - bringing visitors who are interested in participating in outdoor activities or interpretation of the area's heritage.

ACTION STEPS

The steps required to implement this tourism development opportunity are as follows:

Public Sector Role

1. Initiate discussions with Rossland concerning infrastructure development to support this opportunity.

2. Meet with Red Mountain property owners to introduce this tourism development opportunity approach and discuss their level of interest and potential participation.

3. Depending on the interest expressed by the Red Mountain property owners, encourage them to undertake necessary analyses based on the opportunity described above, including refinement of the base facilities plan.

4. Establish a program for enhancing the interest in, and capability for packaging of tourism experiences assuming Red Mountain as a staging area. Coordinate the implementation of this activity with the programs for development of greater expertise and interest in backcountry experience packaging (Opportunity 1.2.1). In pursuing this opportunity, liaise with appropriate community and tourism industry representatives including the Rossland/Red Mountain Development Society.

5. Initiate discussions amongst nearby tourism interests and communities to enhance local products in anticipation of the Red Mountain development. Local tourism development opportunities identified at the open house sessions can be used as a starting point. In addition, some communities have participated in the Ministry of Tourism's community strategies program. Here again, useful initiatives can be identified through the results of that exercise.

Private Sector Role (Actions and Proposed Investment)

1. Refinement of the base facilities plan (Red Mountain property owners) with supporting feasibility analyses.

2. Development of resort accommodation of high quality.

3. Creation of tour packages which will utilize the Rossland/Red Mountain resort area as a staging area offering such activities as:

   - backcountry experiences;
   - heritage tours;
   - recreational tours.

PRIORITY OPPORTUNITY: **1.1.2 Nelson Waterfront Development**
CATEGORY: **Destination Development**
CATEGORY EMPHASIS: **Enhance and Build on Existing Strengths. Improve Quality of Accommodation.**

OPPORTUNITY DEFINITION

The largest community in the western portion of the region, Nelson has recently gained considerable profile through such activities as:

- serving as a location for major movie productions;
- twinning with Shuzenji, Japan;
- receiving designation under the "Strong Communities" program;
- revitalizing the downtown area, based on a heritage theme.

The result of these activities has been the development of Nelson as a tourist attraction in itself, building on strengths related to such activities as skiing at Whitewater and boating on Kootenay Lake. Nelson also functions as a service centre for nearby communities, particularly to the north and east. With its full range of tourism services and facilities, Nelson assumes an important role as a "staging area" for visitors to explore the nearby attractions in this part of the region.

The strength of Nelson's role in the tourism sector can be considerably enhanced through redevelopment of the waterfront area. Waterfront development in urban and community centres throughout Canada has, time and again, proven to result in:

- an increase in the attractiveness of the community (frequently waterfront areas are featured in tourism brochures by these communities);
- access to water based recreation.

This waterfront development opportunity includes the following components:

- Implementation of the Water's Edge Resort complex proposal including:
  - 70-room resort hotel with full "A" license
  - 100 berth full service marina
  - sea plane centre
  - food and beverage rooms
  - convention facility
  - other related resort and convention facilities.

- Ancillary development of pedestrian connections to the waterfront park

  - implementation of the tramway concept
  - development of a high quality residential component (e.g., condominiums)
  - pedestrian linkages to Nelson's downtown.

Completion of this waterfront development will add sorely needed quality accommodation units to this part of the region. To be sure, in the short term there will be some competition for existing hotel and motel facilities. However it is expected that this waterfront development will very quickly benefit all of the tourism sector in Nelson and nearby areas by increasing the attractiveness of the community for tourism visitation. Indeed, it is expected that this development will result in increased investment related to the tourism sector in Nelson itself, as well as a stronger tourism sector in nearby areas.

The Water's Edge proposal is intended to serve as a destination resort for both summer and winter tourism activities. There is no doubt that the facility can attract destination visitors from:

- nearby British Columbia regions;
- the Lower Mainland;
- Eastern Washington State;
- Western Canada (in particular Alberta).

It will also serve the business traveller and a portion of the existing touring market in the Nelson region.

IMPLEMENTATION ACTIVITIES

The proponents for the Water's Edge development have completed all preparatory work and are in the midst of securing financing for the project. The key activity here is to lend continuing support to that effort to ensure that the Water's Edge development proceeds.

Supporting activities related specifically to the waterfront include:

- encouraging the implementation of the Hellecksen's Boat Tour concept;
- implementing the waterfront tramway project.

Tourism Infrastructure

As with any of the destination development opportunities, work is required to encourage the development of package experiences. The introduction of this waterfront development will provide additional infrastructure necessary to support such activities as day tours to explore this part of the region. The experience base includes opportunities in:

- heritage tours (e.g., Kaslo, Sandon, New Denver, Silverton);
- boat tours;
- scenic touring and interpretive tours of the Kootenay Lake area.

In addition, attention should be placed on tours of communities, both in the Kootenay Lake area and to the south and west of Nelson.

BENEFITS TO THE REGION

Two major benefits accrue to the region from this regional opportunity:

- the introduction of additional high quality accommodation of sufficient size to accommodate touring groups;
- the strengthening of Nelson as a destination community in the region.

The opportunity not only benefits Nelson, but also serves as an "anchor" for the development of spinoff tourism activities in the immediate vicinity. For example, such a facility can serve as a "staging area" for heritage theme tours to the Lardeau Valley area, Kootenay Lake interpretive tours, Arrow Lake Valley, Slocan Valley and a variety of backcountry experiences.

ACTION STEPS

The steps required to implement this tourism development opportunity are as follows:

Public Sector Role

1. Continue and enhance efforts to ensure that the Water's Edge marina proposal is implemented.

2. Meet with the proponents for the Helleckson's Boat Tour concept to provide background information and assistance where possible to encourage the proponent to refine the project with supporting business plans and financing.

3. Implement the tramway project in concert with the Water's Edge Project implementation.

4. Initiate discussions amongst nearby tourism interests and communities to encourage development of local products in anticipation of the Water's Edge project and the accommodation base it provides.

5. Encourage operator participation in the program for packaging of tourism experiences (Action Step 4 for Rossland/Red Mountain, Opportunity 1.1.1).

Private Sector Role (Actions and Proposed Investment)

1. Development of the Water's Edge Hotel/Marina project.

2. Implementation of the Helleckson's Boat Tour project and other water-based touring projects as appropriate.

3. Creation of touring packages in heritage, Kootenay Lake interpretative tours, and backcountry experiences.

PRIORITY OPPORTUNITY: **1.1.3 Kootenay Lake/Creston Area**
CATEGORY: **Destination Development**
CATEGORY EMPHASIS: **Enhance and Build on Existing Strengths. Improve Quality of Accommodation.**

OPPORTUNITY DEFINITION

The Kootenay Lake/Creston area already functions as a destination in its own right. Endowed with a magnificent lake, scenic mountain views, a variety of interesting communities, and natural features it can serve an even more prominent role as a regional destination to an emerging market amongst those seeking a combination of interpretive/recreation vacations at smaller, quality accommodation facilities. Natural attractions such as Kokanee Glacier National Park and Cody Caves Provincial Park in the northwestern part of this area complement natural sites such as Pilot Point peninsula and the Creston Valley Wildlife Management Area in the eastern part of the region. Three provincial marine parks are located on Kootenay Lake and offer further interpretive experiences, two of which are accessible only by boat, therefore, enhancing the potential interest level on the part of the visitor. Heritage attractions such as the S.S. Moyie in Kaslo, downtown Nelson, and the Creston Historical Museum add to the diversity of this area and the activities which the visitor can enjoy.

This area can serve a much enhanced destination role characterized by small, quality resorts and bed and breakfast facilities, natural and recreational experiences, sport fishing, and heritage/community/scenic touring. While there are a number of accommodation facilities throughout the area, the upgrading of existing facilities and introduction of new ones will provide a stronger foundation for the area as a destination. The area offers particular attraction for older age groups, as witnessed by the recent successes in elder hostel market development. In addition, it provides an ideal location for family oriented vacations. One of the deficiencies at this time relates to the extent and quality of the interpretation facilities throughout the area. A more integrated approach which encourages visitors to explore the Kootenay Lake/Creston area, interpretation improvements at existing sites and the introduction of new interpretive sites will all help to strengthen the destination orientation. More focused marketing which emphasizes the area's natural and small community/bed and breakfast orientation can also help to secure new markets.

Specialized market segments for which this area can offer particular appeal include:

- elder hostels;
- families seeking a combination of recreation opportunities and natural interpretation;
- segments interested in wildlife and natural interpretation and excursions into the backcountry.

In addition to these markets, the sensitive development of Kootenay Lake, as generally described above, will serve to strengthen capture rates from existing markets and encourage longer stays by touring markets. The introduction of additional small, high quality accommodation facilities will help to fully establish the destination orientation of this area offering access to natural, recreation, fishery-related, and heritage-related experiences.

IMPLEMENTATION ACTIVITIES

The Accommodation Base

Implementation activities should be oriented to three areas:

- encouraging the development of a network of quality bed and breakfast facilities;
- developing support initiatives to encourage upgrading of existing facilities where appropriate;
- identifying potential sites for new, high quality resorts and bed and breakfasts which fit with the Kootenay Lake/Creston area theme described above.

Infrastructure

The main concern with infrastructure from a tourism development perspective relates to the quality of the road network, particularly in the area north of Balfour. This particular road system is also the subject of attention in regional touring opportunities (3.2 below).

Interpretation Facilities

Consistent with the theme of small, quality accommodation throughout the area, improvements in interpretation of natural features (both marine and land based) should be pursued. Initiatives include:

- development of an integrated theme for the entire Kootenay Lake area;
- upgrading of existing interpretation at natural sites;
- introduction of new interpretive sites where appropriate throughout the area.

Tourism Infrastructure

The priority actions for support to increase the strength of the destination orientation of this area include assistance to existing and potential operators to secure financing for accommodation and development of a focused marketing program.

BENEFITS TO THE REGION

In addition to general benefits from a stronger destination area, the Kootenay Lake is strategically placed between the east and west areas of the region. As such, both areas are easily accessible to visitors drawn to the Kootenay Lake itself. Therefore, spinoff benefits from tourism activity can be expected, particularly for communities such as Cranbrook and Kimberley to the east and Salmo, Trail, and Castlegar to the west.

ACTION STEPS

The steps required to implement this tourism development opportunity are:

Public Sector Role

1. Initiate a support program focused on accommodation development and including activities to encourage upgrading of existing properties, identify small resorts and bed and breakfasts and development of a network theme for bed and breakfasts. Specific steps for implementing such a support program include:

   - meet with existing operators to identify needs and interests in upgrading accommodation facilities;
   - based on needs assessment of existing operators, identify support programs which can be utilized to assist operators (e.g., financing, development planning);
   - undertake a review of the Kootenay Lake waterfront land base to identify possible new sites for small resorts and quality bed and breakfasts;
   - encourage private land owners for new sites to consider tourism accommodation development consistent with the area theme or, if Crown Land, encourage appropriate government agencies to initiate actions to release lands for private sector accommodation development based on specific proposals;
   - meet with existing accommodation operators to prepare an accommodation network theme which can be reflected in signage related to individual facilities as well as marketing brochures specific to the Kootenay Lake/Creston area.

2. Pursuant to number 1 above, develop market profiles for use by operators, identifying market segments which are potential targets for this destination area (e.g., older demographic groups and family oriented markets) for distribution to operators.

3. Work with appropriate ministries to develop an integrated signage and interpretation plan for the Kootenay Lake/Creston area generally and to identify specific upgrading and development in the interpretation area.

4. Apply the program for development of packaged experiences (discussed in Rossland/Red Mountain Opportunity 1.1.1) for both water-based and land-based tour guide business opportunities.

5. Design and implement a focused marketing plan for the Kootenay Lake/Creston area as a destination area in co-operation with communities and the tourism industry.

6. Review the area development opportunity proposal with appropriate fisheries representatives to identify specific actions which might be included as part of the Action Steps described herein to help ensure maintenance and enhancement of the fishery.

Private Sector Role (Actions and Proposed Investment)

1. Investment in upgrading existing accommodation facilities.

2. Investment in developing additional small resorts and bed and breakfast facilities.

3. Participation in development of a marketing plan for the area.

4. Participation in the design of an integrated signage and interpretation plan.

5. Creation of both water and land-based tour packages.

PRIORITY OPPORTUNITY: **1.1.4 Upgrade Resort Accommodation —Kimberley/Fernie**
CATEGORY: **Destination Development**
CATEGORY EMPHASIS: **Enhance and Build on Existing Strengths. Improve Quality of Accommodation.**

OPPORTUNITY DEFINITION

The ski facilities at Kimberley and Fernie offer an attraction which is regional in scope. The opportunity here involves strengthening the quality of the resort accommodation so necessary to the Kootenay region's role as a destination area, to improve the quality of the ski experience itself and to encourage greater diversification into summer destination markets. In encouraging upgrading of these facilities, market positioning is a very important consideration. These resort areas are well suited to a stronger orientation to family markets and the capacity to offer an enjoyable destination experience for families, combining skiing and other activities. As such, the resort areas can position themselves slightly lower in pricing than similar Windermere Valley facilities to distinguish themselves and to carve out their own, identifiable market niche.

Summer diversification potential will be enhanced considerably by the support program for backcountry package and tour development described in Opportunity 1.2.1. In addition, linkages to the secondary resource road circle tour with a backcountry theme (Opportunity 1.2.2), the mining theme tour (Opportunity 3.2.2) and the Native history/culture interpretation (Opportunity 4.2) will all help to strengthen the tourism industry environment in which investment in upgrading can take place.

Upgrading of accommodation can take several forms including:

- upgrading of existing facilities;
- additions of ancillary facilities (e.g., recreation-oriented) to existing operations;
- introduction of new resorts;
- upgrading of other tourism products (e.g., golf courses) in the immediate vicinities of the resort areas.

The market potential for these resort areas includes not only strengthening capture rates from existing markets, but also focusing on establishing a specific market niche related to a family destination area. The resort areas will also benefit considerably from implementation of related opportunities such as the Native history/culture interpretation and the mining theme tours. Both can serve as "staging" areas for excursions and explorations of the southeastern portion of the Kootenay Region.

IMPLEMENTATION ACTIVITIES

The focus of the implementation activities should be twofold:

- consultation with existing operators to encourage them to initiate development projects and provision of appropriate support to ensure that these projects are implemented;
- consultation with nearby communities to identify tourism product upgrading which can support the potential of the two resort areas and reduce the risk of investors.

Ancillary implementation activities here include coordination of the efforts of the two resort areas with the schedule for implementation of regional priorities in tourism development described in this report.

BENEFITS TO THE REGION

This opportunity will provide stronger destination resort areas with a clear market niche in the southeastern portion of the region. They serve as "anchors" to increase the appeal of tourism products such as the secondary resource route circle tour (backcountry theme) and the mining theme tours. They also serve to provide high quality accommodation consistent with the needs and expectations of emerging markets.

ACTION STEPS

The steps required to implement this tourism development opportunity are as follows:

Public Sector Role

1. Undertake consultation with existing operators to identify specific needs and the potential for upgrading of accommodation and ancillary facilities.

2. Work with existing operators to review existing market performance, to explore in detail the potential for a family-oriented market niche, and provide background information on family-oriented markets drawn from recent visitor and residents surveys undertaken by the Ministry of Tourism.

3. Based on the needs assessment, encourage operators to prepare specific development projects and coordinate with assistance program representatives, where appropriate (e.g., financing) to improve the prospects for implementation of private sector investment.

4. In the course of working with existing operators, ensure that their projects and plans take into account linkages with other regional priorities for tourism development.

5. Undertake consultation with nearby communities to identify priorities for local tourism development which can provide ancillary recreational and tourism-related activities using the two resort areas as a "staging" area.

Private Sector Role (Actions and Proposed Investment)

1. Investment in upgraded and new accommodation.

2. Investment in ancillary facilities, where appropriate.

3. Creation of tour packages linked to the resort areas.

4. Participation in development of a coordinated marketing plan to establish the two resort areas with a distinctive market niche.

PRIORITY OPPORTUNITY: **1.2.1 Backcountry Experiences**
CATEGORY: **Destination Development**
CATEGORY EMPHASIS: **Backcountry Package Experiences**

OPPORTUNITY DEFINITION

The Kootenay Region offers significant potential for the development of backcountry packages encompassing both summer and winter recreation. The region is well known for excellence in heli-skiing and cat-skiing experiences and is endowed with exceptional areas such as Top of the World, Height of the Rockies, and St. Mary's Alpine Park which offer opportunities for backcountry tourists. The area is also host to a network of guide outfitters who are among the province's most successful.

A backcountry experience can include not only high end hunting and skiing packages, but also more modest mountain biking and hiking tours. The region's natural endowments and wildlife viewing opportunities place it as one of the select few destinations where backcountry experiences are considered international class in nature.

While any individual backcountry package tour is not sufficiently large to constitute a major regional development opportunity, taken together, all backcountry experiences constitute one of the highlights of the region's products capable of successful marketing to an international audience. The challenge is to encourage local entrepreneurs and operators to take advantage of this potential and establish a stronger network of experiences for the region's visitors. It is also important to provide a range of experiences reflecting the capability levels of visitors. For instance, we should not be restricted to the capable individuals who will undertake five day hiking or heli-skiing experiences. We should also "expose" visitors who are only interested in a modest experience to the region's backcountry resources. In this context, the regional tourism development opportunity is generally defined as follows:

1. Develop a focused backcountry support program to increase awareness of backcountry tourism opportunities amongst the region's operators, provide marketing workshops and seminars to assist them in exploring market potential, and examine the potential for funding support initiatives including funding assistance programs already offered by the province and seminars with the financial community to encourage them to participate in financing for backcountry operations.

2. Establish a secondary road tour with the "backcountry" theme (although not truly backcountry given the introduction of a road network, the point here is to expose the more casual visitor to the Kootenay wilderness area) structured generally as follows:

- a circle tour comprising secondary (gravel road) connections east and west through the region utilizing the St. Mary Road from Kimberley to Gray Creek in the south and the proposed Jumbo Pass from Invermere to West Central Kootenay in the north, with features to include:

    - an interpretive theme for each of the secondary road connections incorporating integrated signage and interpretive sites (e.g. forestry, wildlife, etc.);
    - access to wildlife viewing sites if possible and appropriate;
    - provision of hiking opportunities of short duration at selected locations along the secondary road locations;
    - safety related signage.

One of the advantages of the secondary road theme tour described above, is that it encourages greater exploration of the region through east-west connections. The east-west road connections by themselves present a significant opportunity, over and above their function as throughways, to develop an interesting circle tour product which integrates various parts of the region.

The enhancement of the backcountry product will result in an increase in destination visitors. Although each operator will develop their own market niche, potential markets include the major urban centres -- Spokane, Vancouver, Seattle, Calgary and Edmonton. In addition, long-haul markets from California, Toronto, eastern U.S. and overseas are also markets targeted for backcountry product.

IMPLEMENTATION ACTIVITIES

Tourism Product Education and Related Support

This activity involves the design and implementation of a program which has as its features a close look at the nature of backcountry packaging, the process of product development, marketing, funding and financing strategies. Additional features should include the creation of linkages to outdoor/adventure travel wholesalers and increased information exchange between interested region operators and outside wholesalers. It can readily be conducted through workshops and seminars (perhaps in conjunction with the tourism associations). Supporting materials for the workshop would be prepared. Many already exist in one form or another which can be passed on to interested operators. It is not a program of long duration, but rather involves an effort to heighten awareness about this tourism sector potential and provide starting information for those who are interested but unsure of the product development and marketing process. The role of the local colleges should also be investigated.

Secondary Road Theme Tour

The infrastructure road network for this tour product is already in place with the exception of the proposed Jumbo Pass connection to Highway 31. Completion of the Jumbo Pass connection will not only provide the infrastructure necessary to establish the circle tour but also will encourage further visitor exploration of the backcountry.

Interpretive Facilities

This involves the design and implementation of an interpretive plan for the east-west secondary road connections of the circle tour. It will require the input of a variety of ministries in addition to consultation with effective communities and regional interests.

BENEFITS TO THE REGION

The backcountry product experience which the Kootenay Region now offers has substantial growth potential. Development of this industry, and providing more casual exposure to the region's backcountry through the theme tour both serve as inducements to the region's industry to fully embrace the backcountry product potential. Economic diversification benefits here relate to the potential for a number of small businesses which can be created to offer products and services in this sector.

ACTION STEPS

The following action steps are necessary to implement this development opportunity:

Public Sector Role

1. Initiate discussions with appropriate ministries, including the Ministry of Transportation and Highways to encourage development of a design plan for interpretation of the east-west connections for the circle tour road and incorporate it as part of the feasibility study for the Jumbo Pass connection.

2. Design and implement a program for backcountry experience product development. In the process of so doing, undertake consultation with operators in the region, associations and colleges as appropriate (e.g., regional tourism associations, guide outfitters).

3. Work with the Ministry of Crown Lands to encourage the private sector to develop commercial recreational sites in the backcountry area of the region in accordance with the Ministry's commercial recreation site study.

Private Sector Role (Actions and Proposed Investment)

1. Participate in the backcountry experience product development program.

2. Create backcountry tourism packages and undertake necessary facility development in association with backcountry packages.

PRIORITY OPPORTUNITY: **2.1 Kaslo, Sandon, New Denver, Silverton, Heritage Attraction Development**
CATEGORY: **Heritage Attractions**
CATEGORY EMPHASIS: **Upgrade Existing Regional Heritage Attractions and Introduce New Regional Products**

OPPORTUNITY DEFINITION

One of the region's outstanding strengths from a tourism perspective is the wealth of its resources. These operate at regional levels (e.g. Fort Steele, Cranbrook Railway Museum, the Kaslo/Sandon area and Rossland Mining Museum) and at community levels throughout all communities in the region. The strength of the heritage theme and scope of activities offered to the visitor can be improved substantially with the development of a stronger product in the portion of the region encompassing the Kaslo/Sandon/New Denver/Silverton communities. This group of communities offers extensive heritage related experiences in a scenic setting and can serve as a regional draw in and of themselves. The range of heritage resources (both developed and undeveloped) is shown in Exhibit 9.2 and covers features such as Kaslo's S.S. Moyie, abandoned townsites, mining structures, and community based heritage attractions. This opportunity involves development to provide the following characteristics:

- development and interpretation of specific sites in or adjacent to each community, packaging of the four communities as offering a diversity of heritage attractions in a scenic setting;
- accelerated development of ancillary activities such as hiking trails, heritage sites;
- design of an integrated theme which can characterize site development and signage and be carried forward through to marketing literature;
- design and implementation of an interpretive introduction to the heritage resources of the four communities based in Kaslo (given its ready accessibility to extensive accommodation facilities south and including Nelson and Castlegar).

At this stage it is not appropriate to assemble a detailed implementation plan. This requires a partnership approach with appropriate provincial government ministries and the four communities. Design guidelines which should be kept in mind to ensure realization of this regional opportunity include:

- offering a variety of activities that can serve different markets, including:
  - guided tour packages
  - independent touring and exploration
  - in-depth experience and interpretation for those with greater interest
  - more casual experiences combined with recreation and scenic touring for those with a more casual interest

EXHIBIT 9.2: HERITAGE RESOURCES – ATTRACTIONS

Name	Location	Site Type	Development Status
Kaslo	Kaslo	HD	D
Kaslo City Hall	Kaslo	HB	D
Kootenay Lake Farmers' Institute	Kaslo	HB	D
Langham Cultural Centre	Kaslo	HB	D
SS Moyie	Kaslo	MU	PA
Woodberry Mining Museum	Kaslo	MU	D
Ainsworth Hot Springs	Kaslo	HS	D
Bear Lake City	Kaslo	GT	PO
K & S Railway Historic Trail	Kaslo	RW	PA
South Fork (Zwicky)	Kaslo	GT	PO
Town of Retallack	Kaslo	GT	PO
Townsite of Blaylock	Kaslo	GT	PO
Townsite of Keen	Kaslo	HS	PO
Townsite of Nashton	Kaslo	GT	PO
Sandon Museum	Sandon	MU	D
Townsite of Sandon	Sandon	HD	PA
New Denver	New Denver	HD	D
Silvery Slocan Historical Museum	New Denver	MU	D
Dickenson Mine	New Denver	HB	D
McGuigan	New Denver	GT	PO
Rosebery	New Denver	GT	PO
Slocan Mines Plaque	New Denver	SI	D
Townsite of Alamo	New Denver	GT	PO
Townsite of Cody	New Denver	GT	PO
Townsite of Glegerich	New Denver	GT	PO
Townsite of Three Forks	New Denver	GT	PO
Townsite of Watson	New Denver	GT	PO
Townsite of Zincton	New Denver	GT	PO
Bear Trap Plaque	Silverton	RS	D
S.S. William Hunter Plaque	Silverton	RS	D
Silverton (Old)	Silverton	HD	PA
Silverton Outdoor Mining Museum	Silverton	MU	D

LOCATION:
(vic) in the Vicinity of

SITE TYPE:
MU Museum
EV Event of Festival
HB Heritage Buildings
HS Historic Site
GT Ghost Town
DT Drowned Town
AS Archaeological Site
SI Stop of Interest
RS Roadside Sign or Cairn
AR Archive
MO Monument
RS Roadside Sign or Cairn
AR Archive
MO Monument
HD Heritage District
TR Trail
RW Railway
CC Cultural Centre

DEVELOPED:
D Developed
PA Partial Development
PO Potential Development
U Undeveloped

- taking advantage of scenic views with high tourism values when selecting sites for development and interpretation
- providing for protection and management of resources (that is, developing and informing the public of only those sites which can be properly protected).

IMPLEMENTATION ACTIVITIES

Heritage Attractions Development and Interpretation

The first step in implementing this opportunity involves the preparation of a design plan for site development and interpretation, ancillary activities, upgrading of existing museum facilities, integrated signage themes, and the introductory interpretation facility for Kaslo. It should be noted that the introductory interpretation facility at Kaslo will also serve as an important "anchor" element in the development of heritage theme tours described in Opportunity 3.2.

Infrastructure Improvements

Full implementation of this opportunity would require supporting road improvements to the existing road network north of Balfour to Kaslo and west to Silverton. In addition, some improvement to the access road to the Sandon site should be undertaken.

Tourism Infrastructure

The priority action here involves support in the development of marketing literature appropriate to this expanded heritage attraction. Ancillary activities include programs to encourage heritage guided tour packages of varying lengths and levels of interpretation.

BENEFITS TO THE REGION

The major benefit to the region rests with the strengthening of the region's heritage tourism product. It encourages more extensive exploration of the region's resources outside of main communities and serves to encourage visitors to visit this portion of the region -- an area which historically has not enjoyed extensive visitation. Some of the heritage products which can be developed (e.g. the "ghost town" theme) can be readily sold to markets outside the region.

Development of this heritage attraction also helps to create spinoff opportunities such as the heritage theme tours described in Opportunity 3.2. Benefits here will accrue to many of the smaller communities in this portion of the region which might otherwise be overlooked in regional tourism development.

ACTIONS STEPS

The action steps necessary to implement this opportunity are as follows:

Public Sector Role

1. Assemble a detailed design and development plan for heritage attraction development in consultation with communities and existing facility operators.

2. Approach the Ministry of Transportation and Highways to consider improvements to road networks necessary to support increased visitation to this heritage attraction.

3. Based on the accepted design and development plan, prepare an organizational structure to ensure protection of all heritage sites in this area.

4. Develop a focused marketing plan and supporting promotional material based on the accepted design and development plan.

Private Sector Role (Actions and Proposed Investment)

1. Creation of heritage theme tours in the area.

PRIORITY OPPORTUNITY: 3.1 General Information/Touring Improvements
CATEGORY: Touring Development
CATEGORY EMPHASIS: Developing Touring Experiences Capable of Drawing Tourists to the Region and Linking Communities/Theme Areas.

OPPORTUNITY DEFINITION

The importance of good signage, circle tours, and inter-regional linkage tours was identified throughout the public meetings as an important regional consideration for supporting tourism development. As such, it has been designated as a regional development opportunity to the extent that it encourages visitation to the region, links communities, encourages exploration of the region, and provides easily accessible information to the visitor. Based on the public input throughout the open house sessions and interviews with the tourism industry, several areas have been identified, which together constitute this general information/touring improvements opportunity:

1. Upgrading of existing tourism information centres, where appropriate, and the introduction of new tourism centres, particularly at key border crossings or entry points to the region. Efforts here could include working with local communities and community organizations in appropriate locations to identify areas to upgrade tourism information.

2. Establishing working relationships with officials at border crossings to investigate and implement ideas for improving hospitality, providing basic tourism information related to the region, extending hours of operation, and providing tourism service information (e.g., community descriptions, accommodation, car rental information, and the like).

3. Signage programs related to both community and to gateway points to the region. In the case of communities, many mentioned that signage improvements would help in encouraging touring travellers to stay longer. Considerations here could include a community theme program where each community selects a particular theme they wish to portray to the travelling public and incorporates this as part of entry signs. Gateway signage should impart to the visitor a sense of the diversity of activities in the region. For greater impact, these are best incorporated as part of a highway pulloff or tourist information facility, provided that it is located adjacent to the region's entry point. In the case of highway pulloffs, selection of a site with scenic value is particularly important and the signage should be sufficiently attractive to encourage visitors to take the time and stop.

4. The inter-regional linkage tours were identified by many during the public process as an effective strategy to encourage visitation to the region. (The gateway signage projects described above are an important feature of inter-regional tours). This will require consultation between the region, its communities, and corresponding communities and tourism industry representatives on highway systems (e.g., #3) which tie the region to other jurisdictions. Based on traffic volumes and patterns, priorities should be probably be placed on the Crows Nest Pass and linkages to the TransCanada Highway.

5. Improving the circle tour product in the region will encourage more exploration of the region and link communities in a more effective way. Several new circle tours are proposed as regional priorities in and of themselves (the heritage theme tours in the Kaslo/Sandon/New Denver/Silverton area of the region and the secondary resource road backcountry theme tour). However, existing circle tours, such as the Highway 3/93 tour, should also be more effectively promoted and signage developed to support this.

IMPLEMENTATION ACTIVITIES

Given the scope of this regional priority, it is important to segment the implementation process into manageable packages such as:

- tourist information centres;
- border information/hospitality improvements;
- community and gateway signage;
- inter-regional linkage tours;
- circle tours.

Action Steps are presented below based on each of the packages. An important feature of the implementation process here is the consultation requirement with communities and the tourism industry.

BENEFITS TO THE REGION

Benefits to the region from this opportunity are largely indirect, in that implementation will result in a much improved tourism information program serving all parts of the tourism sector in the Kootenay Region. In addition to improving the potential for encouraging long stays by the touring traveller, it will also encourage destination travellers to explore the region or to return to the region.

ACTION STEPS

The action steps necessary to implement this opportunity are as follows:

Public Sector Role

1. Tourist Information Centre Upgrading

   - request a review of tourism information centre functions and effectiveness within the region by the Ministry of Tourism;
   - once the review results are completed, initiate consultations with communities to identify specific areas for upgrading tourist information centres or introducing new information centre functions;
   - establish and budget funding support and community participation as appropriate to implement priorities.

2. Border Information/Hospitality Improvements

   - initiate a meeting by the Action Committee with border crossing personnel to inform them of the concerns of the tourism industry, the tourism development opportunities strategy, and the results of the public input process;
   - identify areas where improvements can be made without jeopardizing the integrity of the border crossing function, while enhancing the tourist border crossing experience, in consultation with border crossing officials;
   - establish roles and responsibilities for implementation.

3. Community and Gateway Signage

   - initiate discussion with appropriate Ministries to determine input and funding potential for a community signage program;
   - based on the results of inter-Ministry consultation, initiate consultation with communities to develop and implement community signage consistent with this tourism development opportunities strategy;
   - initiate discussions with the Ministry of Transportation and Highways concerning a gateway signage program, including gateway pulloffs and border crossings;
   - identify appropriate sites at highway gateways to the region for highway pulloffs;
   - develop an integrated design approach to gateway signs, in consultation with tourism industry associations.

4. Inter-regional Linkage Tours

   - meet with tourism industry associations to determine their interest and role in participating in inter-regional linkage tour discussions;
   - establish working committees for each inter-regional linkage tour potential with the tourism industry associations and affected communities;
   - provide a coordinating function with working committees concerning the development of inter-regional linkage tours consistent with this tourism development opportunities strategy.

5. Circle Tours

   - initiate discussions with the tourism industry associations to assume responsibility for identifying specific circle tour improvement projects;
   - encourage the tourism industry associations to work in consultation with affected communities.

PRIORITY OPPORTUNITY: 3.2.1 Heritage/Ghost Town (and related) Theme Tours
CATEGORY: Touring Development
CATEGORY EMPHASIS: Strong Interpretation Content with Regional Heritage Attraction As "Anchor"

OPPORTUNITY DEFINITION

With the development of the Kaslo/Sandon/New Denver/Silverton area as a major regional heritage attraction, the foundation or anchors are provided for circle tours (map 3) to the north of this attraction (Lardeau Valley tour) and to the south (Silvery Slocan tour). Exhibit 9.3 provides a list of heritage attractions in addition to heritage resources detailed in Exhibit 9.2. The key features of this opportunity are:

1. An introductory interpretation facility located at Kaslo (Opportunity 2.1) which serves to encourage touring visitors to explore these areas and introduces the tourist to guided visitors.

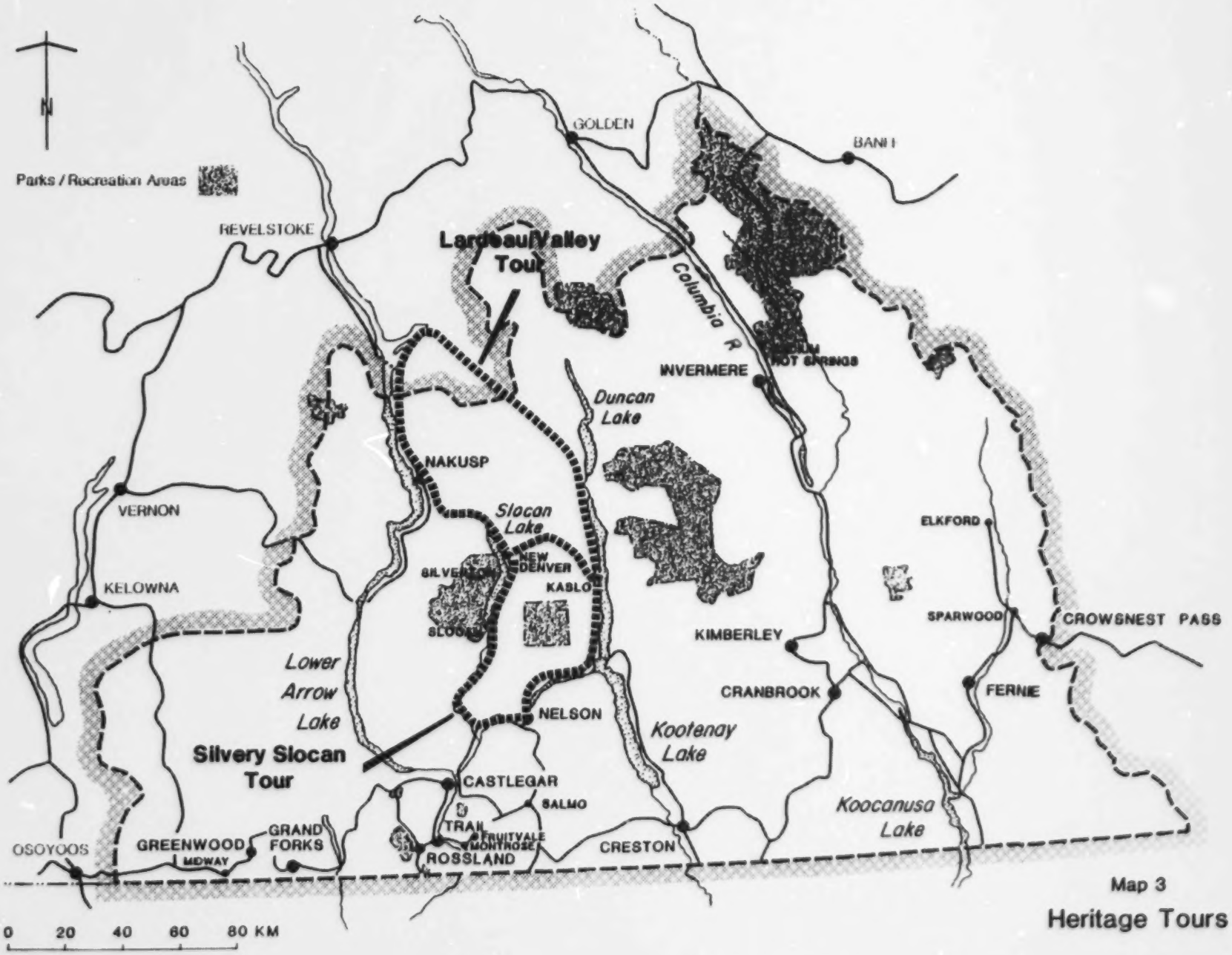
2. Development of the Lardeau Valley tour, incorporating features such as;

   -scenic features and natural interpretation at Meadow Creek;
   -interpretation at Trout Lake Village;
   -key interpretive points along the route;
   -an overnight stay at Nakusp;
   -exploration of the Silverton/New Denver/Sandon/Kaslo heritage attractions;
   -manmade spawning beds at Meadow Creek.

3. Silvery Slocan Tours incorporating such features as:

   -heritage interpretation in the Slocan;
   -a visit to Valhalla Park;
   -pre-history interpretation at Vallican;
   -interpretation of key points along the route;
   -exploration of Nelson.

These are just a few of the possibilities for these theme tours, which can be developed to cater to both travellers with a preference for self-guided touring and those who prefer a package. Given the scenic and natural resources that exist along both routes, it is important to provide a mixture of experiences that will attract not only the heritage market but also those who seek a variety of opportunities. Design and planning for these tourism products will also have to give careful attention to the question of heritage resource protection. There are many undeveloped sites which, if advertised, could suffer damage from increased visitation. Therefore site selection for interpretation in addition to the general features of these touring routes (e.g. integrated signage) must ensure that develcped sites are not exposed to unmanaged visitation.



Map 3

Heritage Tours

EXHIBIT 9.3: HERITAGE RESOURCES – THEME TOURS

Name	Location	Site Type	Development Status
Lardeau Valley Tour			
Earl Grey Pass Trail	Argenta	TR	PO
Fry Creek Trail	Argenta	TR	PO
Duncan City (Howser)	Duncan Lake	DT	PO
Dawson City	Lardeau River	GT	PO
Gold Hill & Bosworth	Lardeau River	GT	PO
Lardo	Lardeau River	GT	PO
Poplar	Lardeau River	GT	PO
Gerrard	Trout Lake	GT	PO
Trout Lake City	Trout Lake	GT	PO
Circle City & Ten Mile	Trout Lake	GT	PO
Ferguson	Trout Lake	GT	PO
Silvery Slocan Tour			
Ainsworth Hot Springs Cemetery	Ainsworth	HS	PO
J.B. Fletcher Store	Ainsworth	MU	PA
Silver Ledge Lodge	Ainsworth	HB	D
Nakusp	Nakusp	HD	D
Nakusp Museum & Archives	Nakusp	MU	D
Slocan City	Slocan	HD	PA
Aylwin City	Slocan	GT	PO
Historic Hand-Hewn Tunnel	Slocan	HS	PO
Old Slocan River Bridge	Slocan	HS	PO
Townsite of Oro	Slocan	GT	PO
Enterprise City	Slocan Lake	GT	PO
Townsite of Vevey Landing	Slocan Lake	GT	PO
Marble Quarry	Marble Head	HS	PO

LOCATION:
(vic) in the Vicinity of

SITE TYPE:
- MU Museum
- EV Event of Festival
- HB Heritage Buildings
- HS Historic Site
- GT Ghost Town
- DT Drowned Town
- AS Archaeological Site
- SI Stop of Interest
- RS Roadside Sign or Cairn
- AR Archive
- MO Monument
- HD Heritage District
- TR Trail
- RW Railway
- CC Cultural Centre

DEVELOPED:
- D Developed
- PA Partial Development
- PO Potential Development
- U Undeveloped

IMPLEMENTATION ACTIVITIES

Tour Development

Like the implementation of the Kaslo/Sandon/New Denver/Silverton heritage attraction, implementation must proceed in two stages:

- design, including site selection, interpretation, and signage
- implementation.

These activities must proceed in consultation with affected interest groups and communities in these areas.

Infrastructure

The primary infrastructure requirements, not already mentioned in other regional priorities, relate to upgrading of the road network from Kaslo along Highway 31 to Highway 23.

Tourism Infrastructure

Like many other of the regional tourism opportunities, the emphasis here should be on development of a marketing plan for these theme tours and implementation of a program to encourage operators to offer guided tours. With Nelson and/or Castlegar as the key staging areas, guided tours from these community locations can be quite successful. This is not to say that other accommodation facilities in communities throughout this area cannot also serve as accommodation facilities for those choosing the Kootenay Region as a destination and opting to explore this part of the region.

BENEFITS TO THE REGION

The main benefits to the region accrue from added tourism products which are regional in importance and can serve to attract new markets as well as extend the length of stay of existing markets. Spin-off benefits will also accrue to more remote parts of the region.

ACTION STEPS

The action steps necessary to implement this opportunity are as follows:

Public Sector Role

1. Prepare a detailed design and implementation plan for the two theme tours in consultation with affected communities.

2. Approach the Ministry of Transportation and Highways to establish upgrading of the Highway 31 road north of Kaslo as a priority.

3. Based on the design and development plan, develop appropriate marketing literature and a marketing plan.

Private Sector Role (Actions and Proposed Investment)

1. Creation of theme tour packages.

2. Upgrading of tourism services and facilities along the theme tour routes.

PRIORITY OPPORTUNITY: **3.2.2 Mining Theme Tours**
CATEGORY: **Touring Development**
CATEGORY EMPHASIS: **Interpretation of the Mining History Prehistoric to Modern Day in the Region**

OPPORTUNITY DEFINITION

The Kootenay Region has a long history of mining which extends to present day activities in areas throughout the region. Mining theme tours offer potential as regional opportunities which can serve to attract visitors to the region and entice those visiting the region for other purposes to take advantage of theme tours. Two theme tours can be developed that are broad enough in scope to serve as regional attractions:

- In the eastern portion of the region

  -a mining theme tour extending from the Alberta border at the Crow's Nest Pass through to Kimberley

- In the western area of the region

  -a mining theme tour from Trail to Greenwood.

Both offer potential for interpretation of the history of mining, as well as visits to modern day mining or smelting sites. In this way, one can incorporate both the heritage theme and modern industrial tourism as part of one package. Exhibits 9.4 and 9.5 detail some of the heritage resources in the eastern and western portions of the region.

In the eastern portion of the region, it is suggested that historic anchors be developed at Michel Natal and Hosmer - both with on-site interpretation. Modern day mining can be interpreted at Sparwood and Kimberley. Tour development should not neglect secondary themes related to the scenic resources of this area and to attractions such as the Cranbrook Railway Museum and Fort Steele. The nature of this opportunity is likely to be most successful with emphasis placed on:

- self guided touring with on-site touring;
- an in-depth guided tour for those interested in the soft rock mining of this area.

The mining theme tour development in the western part of the region is probably best anchored by modern day processing at the Trail Smelter and historic interpretation at the Rossland Mining Museum. Visits to mining facilities at Grand Forks, Greenwood and Midway would form interesting and integral parts of this tour.

EXHIBIT 9.4: ELK VALLEY & KIMBERLEY MINING HERITAGE RESOURCES

Name	Location	Site Type	Development Status
Fernie Museum	Fernie	MU	D
Fernie Coal Plaque	Fernie	SI	D
Hosmer Mine	Fernie	HS	PA
Michel Colliery/Natal	Sparwood	HS	PA
Kimberley Heritage Museum	Kimberley	MU	D
Sullivan Mine	Kimberley	HB	D
Negro Lake	Lumberton	HS/AS	PO
St. Eugene Mine	Moyie	AS	PO

LOCATION:
(vic) In the Vicinity of

SITE TYPE:
- MU Museum
- EV Event of Festival
- HB Heritage Buildings
- HS Historic Site
- GT Ghost Town
- DT Drowned Town
- AS Archaeological Site
- SI Stop of Interest
- RS Roadside Sign or Cairn
- AR Archive
- MO Monument
- RS Roadside Sign or Cairn
- AR Archive
- MO Monument
- HD Heritage District
- TR Trail
- RW Railway
- CC Cultural Centre

DEVELOPED:
- D Developed
- PA Partial Development
- PO Potential Development
- U Undeveloped

EXHIBIT 9.5: GREENWOOD/GRAND FORKS/ROSSLAND/TRAIL MINING HERITAGE RESOURCES

Name	Location	Site Type	Development Status
Greenwood Museum	Greenwood	MU	D
Greenwood Smelter Plaque	Greenwood	SI	D
Boundary Museum	Grand Forks	MU	D
Granby Slag Pile Plaque	Grand Forks	RS	D
Cascade Hydroelectric Power	Christina Lake	HB	D
Rossland Cenotaph	Rossland	MO	D
Rossland Historical Museum	Rossland	MU	D
Rossland Miners Union Hall	Rossland	HB	D
Rossland Mines Plaque	Rossland	SI	D
Dewdney Trail	Rossland	TR	D
COMINCO Smelter	Trail	HB	D
Industry at Trail Monument	Trail	MO	D
Trail City Museum	Trail	MU	D
Sayward	Trail	GT	PO
Waneta	Trail	HS	PO
Phoenix	Greenwood	HS	PO
Grand Forks Smelter	Greenwood	HS	PO
Grand Forks Round House	Greenwood	HS	PO

LOCATION:
(vic) In the Vicinity of

SITE TYPE:
- MU Museum
- EV Event of Festival
- HB Heritage Buildings
- HS Historic Site
- GT Ghost Town
- DT Drowned Town
- AS Archaeological Site
- SI Stop of Interest
- RS Roadside Sign or Cairn
- AR Archive
- MO Monument
- HD Heritage District
- TR Trail
- RW Railway
- CC Cultural Centre

DEVELOPED:
- D Developed
- PA Partial Development
- PO Potential Development
- U Undeveloped

On a priority basis, it is recommended that the eastern mining theme tour proceed first, given the number of other regional initiatives already identified for the western portion of the region.

The emphasis in the western mining theme tour that is, self-guided versus guided, is likely to be most successful if it follows the general strategy described above for the Crow's Nest Pass to Kimberley mining theme tour.

IMPLEMENTATION ACTIVITIES

Tour Development

There is already considerable progress at many sites. The emphasis should be on additional site development and the introduction of appropriate interpretation facilities. Full tour development will also require an integrated signage plan and the preparation of marketing literature.

Consideration must also be given to capacities at operating sites and the needs and concerns of current operators. Management of historic sites can probably rest with adjacent communities, although this requires some investigation.

Tourism Infrastructure

Marketing support and the need to encourage guided tour packages are the two main areas of attention for tourism related infrastructure to achieve full implementation of this opportunity.

BENEFITS TO THE REGION

At the present time, mining attractions tend to operate independently of each other. This opportunity enables the integration of several attractions into one or two major regional products, thereby offering greater potential for attracting visitors. At the same time, it serves to integrate communities and encourage visitor exploration more extensively throughout the region.

ACTION STEPS

The actions steps necessary to implement this activity are as follows:

Public Sector Role

1. Prepare a design and development plan for the east Kootenay mining theme tour based on the descriptions described above in consultation with affected communities.

2. Prepare an integrated signage plan for the mining theme tour oriented to the self-guided visitor.

3. Develop management structures for site specific facilities in consultation with communities and existing mining operators.

4. Based on the accepted development plan, prepare supporting marketing literature and a marketing plan.

5. Once implementation is well along for the eastern mining theme tour, proceed to implementation of the mining theme tour in the western portion of the region.

Private Sector Role (Actions and Proposed Investment)

1. Support in the form of expertise and funding participation by existing mining operators.

2. Participation by destination resort areas (e.g., Kimberley and Fernie in the eastern portion of the region) in providing linkages and supporting mining theme tour concepts.

PRIORITY OPPORTUNITY: **4.1 Columbia River System**
CATEGORY: **Introduction of New Regional Products**
CATEGORY EMPHASIS: **Interpretation of the Region's Resource Based and Creation of Spin-off Benefits Throughout the Region**

OPPORTUNITY DEFINITION

The Columbia River System, as was pointed out by many during the public input process for this strategy, offers substantial interpretation potential ranging from pre-history sites to modern day hydroelectric installations. Areas of interest include:

- pre-history role of the Columbia River System
- navigational role during early European settlement
- modern day hydroelectric role
- the modern day fishery and efforts to sustain it.
- the recreational use of the Columbia River System

In addition to interpretation, this opportunity embraces the potential for tour development (both water-based and land-based), ancillary recreation activity, and the potential for international cooperation (through coordinated action with the U.S.).

The opportunity may be defined generally as a major interpretation centre, probably located in the Castlegar area, supported by a network of interpreted sites throughout the system and integrated by theme tour opportunities.

The Columbia River System enjoys international recognition through the hydroelectric installations on both the Canadian and U.S. sides of the border. One can build on this recognition through an extensive interpretation network that will serve to constitute a major new regional product for the Kootenays. This opportunity can be effectively marketed as an attraction in its own right, particularly to nearby urban markets in the U.S. and Alberta. It can also serve to encourage increased length of stay by the existing touring markets and provide ancillary activities of interest to destination visitors already in the region. As such, it represents not only a significant regional draw but also an effective means to increase expenditures of visitors already in the region.

IMPLEMENTATION ACTIVITIES

The design process for this opportunity should focus on two general areas; the concept of a central interpretation centre which introduces the product and serves as a staging area for commencing specific tours and site visits, and the development of a network of interpretive facilities and sites from south to north in the region embracing B.C. Hydro, West Kootenay Power and Light and Nelson facilities. The design effort involved in implementing this opportunity should include participation by the three power utilities in the region, as well as affected community representatives interested in participating. It is a major effort which will require utility participation as well as that of key Ministries from the provincial government.

Tourism Infrastructure

Like many of the opportunities described previously, the design process provides the basis for development of a specific marketing plan and for initiatives to encourage private sector operators to develop package experiences to assist visitors in exploring the many facets of this regional product.

BENEFITS TO THE REGION

Although probably more long term in nature than previous regional opportunities, the Columbia River System interpretation constitutes a major new regional product which will have substantial benefits to the entire tourism sector. It can serve as a major draw, equivalent to the current ski/golf product and can serve to bring new markets to the region. The potential for international coordination should not be ignored as this constitutes an effective marketing lever, in addition to the benefits from such cooperation in strengthening the overall product.

ACTION STEPS

The following action steps are required to implement this opportunity:

Public Sector Role

1. Initiate discussions with B.C. Hydro, West Kootenay Power and Light, and Nelson to inform them of this proposed tourism development opportunity and to seek their cooperation and support in its implementation.

2. Based on the results of step 1 above, commence the design process for detailed development of this regional product. Seek the cooperation of the utilities in providing technical expertise to assist with interpretive site selection and interpretation. Involve communities in the design process.

3. Select the appropriate site for construction of the interpretation centre.

4. Develop a management framework based on the accepted design which will ensure ongoing development of the product and its continued maintenance and management.

5. Based on the accepted design and development plan prepare an appropriate marketing plan and marketing literature.

PRIORITY OPPORTUNITY: 4.2 Native History/Culture Interpretation (South east Kootenay)
CATEGORY: Introduction of New Regional Products
CATEGORY EMPHASIS: Pre-History Interpretation of Resources

OPPORTUNITY DEFINITION

Although not fully documented as yet, the eastern area of the Kootenay region is the repository of significant pre-history sites such as:

- alpine game drives;
- rock art;
- pre-Historic Mines;
- other sites.

It is understood that in the Top of the World Park alone, there are about 20 pre-history sites which require further documentation, but which approach or possibly exceed the international significance of such sites as Head Smashed In Buffalo Jump in Alberta. Assuming confirmation of their significance, this opportunity offers more potential than any other in the Kootenay Region to generate international recognition and stature for the region as a tourism destination. Although differing in the nature of the natural setting and in specific features, the potential has been likened by some observers to the international significance of the Queen Charlotte Islands. As such it offers a potential to propel the Kootenay Region tourism sector a quantum leap forward.

Until more detailed investigations are completed (for example the proposed archaeological field study in the Top of the World Park in the summer of 1990), there is little that can be said about the specific definition of the opportunity (See Exhibit 9.6 for a partial list of resources). From a strategic point of view, physical implementation would best proceed through the development of a major site as the central attraction (or, if appropriate, a cluster of sites, provided their physical location offers the appropriate environment for site management and interpretation) together with the necessary facilities for ongoing research and documentation to support development of additional sites for visitor access.

An important consideration in site development and documentation is the extreme sensitivity of the sites to indiscriminate visitation. The more that the public is aware, the more they are attracted to search out and visit the sites. Without proper site control and on-site management, there is a very real potential to jeopardize, and even destroy, these resources.

EXHIBIT 9.6: ARCHAEOLOGICAL RESOURCES

1. Sparwood area: Concentration of resources including bison kills, excavation/interpretation opportunities; municipality is interested in using one of its buildings as an interpretive centre.

2. Libby Reservoir area: many resources including concentrations in Provincial Park campground plus several forest service recreational sites; excavation/interpretation opportunities during draw-down.

3. Cranbrook/St. Eugene Mission: Cultural centre and museum based at the mission.

4. Kimberley: prehistoric mining sites could be interpreted in conjunction with interpretive centre at Sullivan mine.

5. Negro Lake area near Cranbrook: prehistoric and early post-contact mining resources; dirt road access due to Cominco exploration.

6. Top of the World Park: intense concentration of artifacts, game kills, cairns; prehistoric quarry.

7. Height of the Rockies/Elk Lakes Provincial Park: near glaciers; prehistoric trail across talls slope; prehistoric campsite, stone quarry.

8. Columbia Lake/Fairmont area: Spirit Trail; pictographs; pigment quarries; house site remains.

9. Columbia River: house sites; potential for underwater prehistoric sites which, if present, would contribute to making this a world-class archaeological area.

10. Kootenay National Park: many varied sites; existing interpretation is not complete.

11. Vallican Site

12. House pits on Zuckerberg Island in Castlegar.

13. Kootenay Lake rock art interpretative tour by Kootenay Lake Band.

14. Southern Purcells summer season high elevation interpretation.

It is also critical in this process to prepare a development plan for the tourism product which reflects the needs, aspirations and involvement of the native community. While there will be substantial spinoff benefits to the non-native community in this part of the region, the opportunity for diversification of native economic activities is also an equally important consideration. Even more important is the need to avoid jeopardizing the integrity of the sites and protecting sites which are regarded by the native community as having spiritual or cultural importance.

In the development ideas presented thus far on this product, the suggestion has been to implement an "ecomuseum" approach with central research/documentation/ interpretation and museum facilities at St. Eugene's Mission. This facility would also serve as the staging area for site visits, generally on a guided tour basis. The degree to which this approach is appropriate should be a subject of the design and product development process involving consultation with both the native and non native communities.

The market potential for this product covers not only existing touring markets, but also offers the possibility for attracting specialized market segments worldwide who are interested in pre-history and Native themes. Such market segments are increasing and can readily be attracted to the Kootenay Region.

IMPLEMENTATION ACTIVITIES

The product development process for this opportunity is extensive and long term in nature. Start up activities include:

- confirmation of the sites and their international significance;
- continuation of a consultation process with native communities;
- if appropriate, initiation of an application process for world heritage site status;
- continuation of discussions with appropriate federal government agencies to assist in the design and development process, given the likely level of significance of this product from a Canadian perspective.

BENEFITS TO THE REGION

Assuming confirmation of the level of significance, and an acceptable product development process, this opportunity offers the potential to significantly increase visitation to the region in general, and the south eastern portion of the region in particular. Tourism destinations throughout the world which emphasize pre-history interpretation for internationally significant resources are finding that their products fully match emerging markets interested in such products. Add to this the magnificent scenic value of this portion of the region and the variety of ancillary activities which visitors can undertake, one can reasonably conclude that this product can easily become one of the top tourism products in British Columbia.

ACTION STEPS

The following action steps are necessary to commence implementation of this opportunity:

Public Sector Role

1. Continued discussions with the native community to identify an appropriate product development planning process.

2. Seek participation or observer status for the Action Committee in the archaeological field study proposed to be undertaken jointly by the Ministry of Parks and the B.C. Heritage Trust for the Top of the World sites.

3. Engage in discussions with appropriate representatives from the Heritage Conservation Branch of the Ministry of Municipal Affairs, Recreation and Culture to commence the application process for a world heritage site (subject to the results of the archaeological field study).

4. Continued discussions with the federal government concerning their potential participation in the product development process.

5. Based on the results of steps 1 to 4 inclusive, prepare a concept for the exact definition of this product and an accompanying implementation plan and schedule.

Private Sector Role (Actions and Proposed Investment)

While no specific sector investment opportunities can be identified at this time, it is important to note that successful implementation of this product will encourage substantial investment, particularly in the eastern portion of the region. This will include tour development, accommodation facility development, and related tourism services. Currently the concept for the cultural centre and museum at St. Eugene mission is being pursued and investment opportunities are being researched. Native economic development, particularly in relation to tour potential, is an important part of the private sector investment possibilities.

PRIORITY OPPORTUNITY: **5.0 Destination Support Activities**
Festivals/Arts/Culture/Sporting Events

CATEGORY: **Destination Support Activities**

CATEGORY EMPHASIS: **Events/Experiences Conveying the Region's Culture/Heritage and Providing Visitors Activities**

OPPORTUNITY DEFINITION

The priority regional opportunities described to this point are focused on specific regional products which can serve to draw more visitors to the region, either through greater capture of existing markets or the introduction of new markets. This opportunity is more concerned with support activities to help strengthen the destination orientation of the region through the provision of activities for the visitor, once they have arrived. In some cases, such as sporting events, they serve as a particular product area drawing a specific market segment to the region. The range of activities includes:

- community and area festivals;
- summer arts programs;
- cultural/artisans centres;
- sporting events;
- fishing derby's.

Many communities already hold festivals ranging in duration from up to a week with specific themes to evening arts programs in the summer - both of which provide ancillary activities for the visitor. These serve to increase potential enjoyment, thereby strengthening the region's destination product. A recent study by the Arts/Cultural community (1989) resulted in identification of several ideas for development.

There is, therefore, an opportunity to engage in discussions with the region's community representatives and the Ministry of Municipal Affairs, Recreation and Culture, to determine any priorities which, from a tourism perspective, are important to pursue in the short term. The advantage of incorporating such a tourism perspective is the potential for increased revenue generation from the visitor community.

In addition to general concern with arts/cultural activities which can support the destination focus of the region, emphasis should be placed on the identification of the potential for cultural/artisan centres at appropriate locations in the region. For example, the extent of development and the size of the summer population in the Windermere Valley area would appear to support the introduction of a cultural/artisan centre that could help to diversify this particular area's tourism product. Similarly, there is considerable activity in the Nelson area related to the twinning of Nelson with Shuzenji and the efforts to identify artisan

products which can be successfully marketed and sold in Nelson's sister city.

The community of Trail has implemented a conscious strategy to attract sporting events as a particular market segment for tourism in the community. Although not necessarily a priority of all communities, sporting events can provide added tourism revenue, particularly in shoulder and off season months, and therefore should not be ignored.

Individually, none of these activities are necessarily regional in scope. Taken together, however, they do provide a range of destination support activities and are an important consideration in regional tourism development. It is not possible at this stage to specifically define the "tourism development opportunity". Rather, what is suggested here is to initiate a process for discussion which can lead to cooperation and coordination and accelerate the process of implementation of specific arts/cultural/sporting event strategies.

IMPLEMENTATION ACTIVITIES

The implementation activities at this very early stage should focus on commencing dialogue with the arts/cultural community, examining and assessing community festival activities from a regional tourism perspective, and encouraging the region to build on Trail's example in attracting sporting events.

BENEFITS TO THE REGION

Regional benefits from this opportunity are largely indirect in that they provide additional opportunities for visitors attracted to the region for other purposes (sporting events and, to a lesser degree festivals, are exceptions). The introduction of festival/artisan centres will help to encourage (through retail sales) greater artisan activity in the area and a more interesting shopping experience for the visitor.

An additional advantage, and one which should not be overlooked, is the enhanced development potential from a cooperative and coordinated approach between tourism and the arts, cultural and festival activities. This has important implications for improvements in the quality of life of region residents, over and above direct tourism benefits.

ACTION STEPS

The following action steps are necessary to implement this opportunity:

1. Initiate a dialogue with appropriate community representatives and arts/cultural groups and the Ministry of Municipal Affairs, Recreation, and Culture to identify:

   - areas where a coordinated approach with tourism development is appropriate
   - specific projects where accelerated implementation based on the recent arts/cultural study can benefit both the arts cultural and tourism sectors
   - determination of an appropriate process for examining the potential and feasibility for cultural and artisan centres.

2. Considerable work has been undertaken by the Kootenay Artisan marketing group to identify artisans and artisan products throughout the region. Discussions should be initiated with them to identify the potential for such tourism products as tours of artisans at their place of work. This could form an important supplementary activity for both destination and touring visitors to the region.

3. Develop a profile of community festivals including themes, timing, duration, and current participation levels. Based on this profile, consult with communities to determine how the impact of such actions as refined scheduling of festivals can improve tourism visitation and participation. Consult with communities concerning the publication of an event marketing brochure for the region.

4. Develop a profile of the sporting events product sector in the region and identify initiatives to support its continuing evolution and growth.

10.0 OTHER REGIONAL TOURISM DEVELOPMENT OPPORTUNITIES

Several tourism development opportunities of a regional nature were identified through the analysis and public input process, but did not receive priority at this time by the Task Force. In the course of evaluating these opportunities, it was determined that while important for implementation, they should not take precedence over the priority opportunities described in section 9.0 based on the criteria listed below:

- consistency with strategy;
- strength of regional draw;
- catalyst for other products;
- ability to increase length of stay;
- ability to increase expenditures;
- investment cost.

Nevertheless, these regional opportunities should be considered for follow-up implementation after the priority opportunities have been completed or are well along the way toward implementation. General direction for implementation of these opportunities is provided in this section for consideration by the Action Committee once the priority opportunities are addressed.

1.1.5 Windermere Valley Diversification

During the course of the public input process, many suggestions were made for summer product diversification in the Windermere Valley. Water-based recreation, in particular, was identified as an area which should receive more detailed attention. While the area's ski and golf products are well established (and in the case of golf, undergoing significant expansion), the natural resource potential of Windermere and Columbia Lakes for tourism activities is not being pursued to the extent that it could.

Some of the potential which could be incorporated as part of this area's tourism product includes:

- greater public access to the water resource;
- introduction of summer water-based recreation activities (e.g., marina, boat rentals);
- interpretation of the Columbia River System (as part of regional tourism development priority 4.1 described in Section 9.0 of this report);
- protection and interpretation of pre-history sites.

Outside of the interpretation potential (which will be public sector-driven), one strategy to consider is the assembly of land parcels strategically located on the lakeshore to be made available for private sector development of water-based recreation facilities. At the same time, improvements in the availability of beach areas owned and operated by the public sector should be developed.

Pursuit of this opportunity should include consultation and cooperation with the region's tourism operators, the objective of which is a product diversification plan with specific priorities for consideration by the Action Committee. At the same time, this effort should account for the potential to be derived from implementation of the priority opportunities described in Section 9.0 such as the secondary road circle tour with the backcountry theme (Jumbo Pass/St. Mary) and the backcountry tourism industry development program.

1.1.6 Hot Springs Development

The Kootenay Region is well known for its natural hot springs and this product has sufficient profile to function as a regional opportunity. Here the proposed strategy is twofold:

- encourage development of undeveloped sites as attractions within several resorts where appropriate;
- encourage ancillary supporting development for existing facilities.

For undeveloped sites such as Halcyon, the first step is to investigate and clarify land status to determine the potential for development. For example, if the land is owned privately, then approaches should be made to existing owners to encourage interest in the development potential and the nature of infrastructure services which may be required to support such development. In the case of land owned by the Crown, the flexibility for development of a hot springs resort is much greater. Possibilities here include the preparation of a call for proposals process to encourage private sector investment. In investigating the potential of undeveloped sites, progress on, and the context provided by, the regional tourism strategy should be taken into account. For example, in the case of the Halcyon site, the efforts to strengthen the heritage product, introduce heritage theme tours, encourage growth in the backcountry package industry and interpret the Columbia River System, all can contribute to a stronger market potential.

Existing hot springs development/resort facilities should also receive some consideration as part of the overall development of the hot springs product. The regional tourism development priorities identified in Section 9.0 will benefit developed hot springs products in the western portion of the region (Ainsworth Hot Springs and Nakusp) by attracting a greater number of visitors and tourist traffic to the areas in which they

are located. Ainsworth Hot Springs will benefit from tourism development activities in the Kootenay Lake area as well as from the strengthening of the heritage resources in the Kaslo/Sandon/Silverton/New Denver areas. Nakusp Hot Springs will benefit from the proposed heritage theme tour circle route (the Lardeau Valley tour) as well as interpretation of the Columbia River System. Indeed, Nakusp is well positioned for an interpretive site for the Columbia River System product.

Existing facilities in the Windermere Valley are in a better position, given their location in the midst of one of the region's strongest product areas (ski and golf) and given their location relative to the major urban market of Calgary. Nevertheless, there are problems to consider, most specifically the requirement to improve Radium's Water and Sewer System which is currently constraining the community's potential for tourism development.

While product development is important, marketing of the hot springs product also merits attention. For example, a hot springs brochure produced for the region and targeted to specific market segments could well add to the capture rate by hot springs resorts. More interpretation of the hot springs resource, on site and through marketing literature, can also yield benefits for this tourism product.

In sum then, several steps are suggested for hot springs product development:

1. Inventory and investigate development potential of currently undeveloped hot spring sites in the region.
2. Determine development strategies for each of these sites in the context of the regional tourism strategy.
3. In cooperation with existing hot springs facilities, identify product development initiatives which will strengthen each product.
4. Assemble an operator working group to develop a marketing plan and supporting promotional material for the hot springs resorts in the region.

1.1.7 Ski/Golf Product

The ski and golf products in the Kootenay Region are considered by many as the one of the region's flagship tourism products. Notwithstanding their strength, there is room to improve the overall product and there is a need to continually strengthen capture rates from existing markets and create new markets. For example, the case of the Kimberley and Fernie ski resort areas presents opportunities for upgrading the product and strengthening the markets attracted to these facilities.

Throughout the public input process, many suggested that golf development or the upgrading of existing golf courses was an important consideration in their community. Although no single facility in the golf area is necessarily regional in scope, taken together they do constitute an important regional product which can be marketed effectively.

There is already joint marketing amongst operators of this product through the regional tourism associations. Greater support for this effort and coordination throughout the region should be considered. At the same time, a product development plan oriented particularly to facilities in or adjacent to communities without strong products at the present time should be considered. As tourism development of this nature is not adopted as a mandate by the regional tourism associations, it logically falls to the Action Committee as a mandate and part of the ongoing tourism development process at a regional level.

2.0 Heritage Attractions

2.1 Improving and Upgrading Regional Attractions

Four heritage attractions were identified as regional attractions, based on the fact that they attract large numbers of visitors annually:

- Fort Steele (60,000 visitors in 1989)
- Cranbrook Railway Museum (13,600 visitors in 1989)
- Rossland Mining Museum (12,000 visitors in 1989)
- Kaslo's S.S. Moyie (10,000 visitors in 1989, down due to construction)

Several members of the public suggested that attention should not only focus on the development of new attractions, but should also consider ensuring that existing regional heritage attractions are supported in their effort to grow. For instance, Fort Steele indicated that there was very little in their budget for marketing, and that they were ineligible for membership in the Rocky Mountain Visitor Association as they are a provincially funded and operated attraction. The Rossland Mining Museum representatives also commented that marketing dollars were limited and that maintenance of the Museum exhibits and facility were largely undertaken on a volunteer basis. The Cranbrook Railway Museum, on the other hand, is aggressively pursuing a major expansion with what Museum representatives term "excellent community support" for their efforts. This facility has been quite successful at getting funding in the past and does not foresee major difficulties in achieving reasonable levels of funding support in the future.

The most effective short-term initiative to be pursued involves marketing assistance for the four attractions. Increased effectiveness of the marketing program will result in increased stabilization of the revenue base. This is critical to ensure ongoing maintenance and development of these facilities. In support of the

marketing effort, there should be a review of expansion plans and possible funding sources.

The first step in implementing this opportunity should be to meet with the operators of the facilities as a group to explore the potential for a joint effort in marketing and product development, and to identify those areas which are best pursued on an individual facility basis. At the level of analysis conducted for this regional tourism strategy, it was only possible to identify general concerns and these must be refined through further discussion in order to develop an effective program.

3.0 Touring Development

3.2.3 Community Heritage

Although not designated as a priority for immediate action, community heritage theme tours do constitute a reasonable development opportunity which should receive attention as time and resources permit. Considerable work has already been undertaken by many communities through the Heritage Area Revitalization Program (HARP) including:

- Nelson;
- Rossland;
- Trail;
- Greenwood;
- Fernie.

It is understood that Grand Forks will submit an application at the next B.C. Heritage Trust meeting. Most other communities in the region have potential to pursue heritage revitalization of this type.

Development of a community heritage theme tour will require the cooperation of communities and the following general steps:

- review with communities the community heritage theme tour potential;
- identification of integrated approaches in product development (e.g., what each community will emphasize and how they wish to be positioned as part of the theme tour);
- a marketing approach including consideration of target markets and preparation of promotional material appropriate to each market.

Exploration of these factors should be carried out in close consultation with the Heritage Conservation Branch of the Ministry of Municipal Affairs, Recreation and Culture. Their advice and knowledge of funding programs will make an invaluable contribution to this process.

3.4 Rail Excursions

Several potential rail excursion products were identified during the course of the public input process. However, when it came to responses on a tourism development emphasis, rail excursions were not named as a priority on the questionnaire. There is some doubt about the feasibility of rail excursions given potentially high capital investment costs, uncertainty concerning access to rail lines, and potential markets. To be sure, rail excursions are an emerging and successful product in many jurisdictions worldwide. However, the Task Force has concluded that these ideas, though regional in scope, should not be pursued in favour of more pressing priorities for tourism development in the region. At the same time, the Task Force did conclude that:

1. It is worthwhile to approach appropriate rail lines to confirm retention of rail right of ways as they provide opportunities for tour development (e.g., hiking).

2. That interpretive signage be developed for these right of ways once they have returned to the Crown.

3. That the Task Force's conclusions be referred to the Transportation Task Force for their consideration and information.

11.0 IMPLEMENTING THE REGIONAL PRIORITIES

In section 8.0 of this report, recommendations were made for establishing an ongoing tourism development process in the Kootenay region as a pilot program. Key components of that approach included:

- an Action Committee comprised of a sub-committee of the Regional Task Force on Parks, Recreation and Tourism and representatives from the Ministries of Regional and Economic Development, Tourism, and Municipal Affairs, Recreation and Culture (Heritage Conservation Branch);
- An Implementation Committee - comprised of ministries with regulatory and funding mandates for public sector infrastructure development related to implementation of the Task Force's regional priorities

In this section, recommendations are made for overall roles and responsibilities, funding approaches, tourism development support initiatives, and initial steps to mobilize the implementation program.

11.1 Roles and Responsibilities

The Regional Tourism Development priorities described in section 9.0 of this report included a series of recommended "action steps" specific to each opportunity. A summary of primary and secondary roles and responsibilities for each priority is shown in Exhibit 11.1. In all cases, the Action Committee assumes a priority role given its function as "manager" of the ongoing tourism development process.

The private sector roles identified in Exhibit 11.1 refer to the intent to encourage private sector investment as part of the regional priority. In some cases (e.g., the backcountry theme tour) private sector involvement is indirect and will be encouraged as a result of implementation of opportunity.

11.2 Funding Approach – Public Sector

The overall theme for funding related to the public sector components of the regional priorities is one of refocusing existing programs and budgets to accommodate, where possible, the Task Force's priority selection. Funding recommendations for implementation are discussed below.

EXHIBIT 11.1 OVERVIEW OF ROLES AND RESPONSIBILITIES

REGIONAL PRIORITY		Action Committee	Implementation Committee	Communities	Private Sector
1.0	**DESTINATION DEVELOPMENT**				
1.1	**Frontcountry**				
1.1.1	Rossland/Red Mtn.	*	x	*	*
1.1.2	Nelson Waterfront	*	x	*	*
1.1.3	Kootenay Lake/ Creston area	*	*	*	*
1.1.4	Kimberley/Fernie Resort Areas	*	x	*	*
1.2	**Backcountry**				
1.2.1	Package Industry Development	*	-	-	*
1.2.2	Backcountry Theme Tour (Jumbo Pass/St. Mary Road)	*	*	x	-

* Primary Role
x Secondary Role

EXHIBIT 11.1 (Cont'd)

		Action Committee	Implementation Committee	Communities	Private Sector
2.0	**HERITAGE ATTRACTIONS**				
2.1	Kaslo/Sandon/New Denver/Silverton	*	*	*	*
3.0	**TOURING DEVELOPMENT**				
3.1	Information/Touring Improvements	*	*	*	-
3.2	Heritage Theme Tours				
3.2.1	Circle Tours				
	- Lardeau Valley Tour	*	*	*	*
	- Silvery Slocan Tour	*	*	*	*
3.2.2	Mining Theme Tours	*	*	*	*
4.0	**NEW REGIONAL PRODUCTS**				
4.1	Columbia River System	*	*	x	x
4.2	Native/Cultural Interpretation	*	*	-	x
5.0	**DESTINATION SUPPORT**	*	*	*	-

* Primary Role
x Secondary Role

Managing the Implementation Process

As with any tourism development program, there is a great deal of consultation and coordination required. The Action Committee, however, must have resource support on-site in the region in order to pursue implementation in a timely manner. The additional workload placed on existing ministry staff and on the volunteer Task Force members who serve on the Action Committee is simply too onerous to permit effective implementation. Therefore, it is recommended that consideration be given to establishing a full time position (jointly funded by the three ministries) to execute the regional priorities under the direction of the Action Committee. Based on the workload requirements, it is expected that a full time position for a period of one year will be required with part-time support thereafter.

Physical Development Component

Most of the regional priorities involve some manner of public sector investment in physical facilities. A preliminary overview of funding potential for the physical development component is shown in Exhibit 11.2. The general theme involves drawing on the capital budgets of appropriate provincial ministries through refocusing and changing priorities to enable implementation of the Task Force's tourism development priorities. This approach is not without precedent. For example, the Kootenay Region Transportation Task Force on Parks, Recreation and Tourism priorities were well received by the Ministry of Transportation and implementation is now proceeding. Although this involves more ministries, the same principle applies.

In many cases (Exhibit 11.2), communities are shown as possible sources of funding for physical development items. For example, signage, heritage attraction development and infrastructure requirements all can reasonably involve some funding participation from communities.

Two new regional tourism products have been identified as priorities by the Task Force on Parks, Recreation and Tourism:

- the Columbia River System interpretation;
- Native History/Culture Iterpretation.

EXHIBIT 11.2: OVERVIEW OF FUNDING POTENTIAL–PHYSICAL DEVELOPMENT COMPONENT

2.0	**HERITAGE ATTRACTIONS**		
2.1	Kaslo/Sandon/New Denver/Silverton	Attraction development	Province/Communities/ Private Sector
		Interpretation	Province/Communities
		Signage	Province/Communities
3.0	**TOURING DEVELOPMENT**	Road Upgrading	Province
3.1	Information/Touring Improvements	Signage	Province/Communities
		Information Centres	Province/Communities/ Private Sector
3.2	Heritage Theme Tours	Interpretation	Province/Communities
3.2.1	Circle Tours		
	- Lardeau Valley Tour	Site Development	Heritage Programs
	- Silvery Slocan Tour	Signage	Province/Communities
		Road Upgrading	Province
3.2.2	Mining Theme Tours	Interpretation/Signage/Site Development	Joint funding by Province/Communities/ Mining Corporations
4.0	**NEW REGIONAL PRODUCTS**		
4.1	Columbia River System	Interpretation Centre	Utilities
		Site Development	Utilities/Province/ Communities
		Signage	
4.2	Native/Cultural Interpretation	Start-up site development and interpretation	Province/Heritage Programs/Federal Programs
		Cultural/Artisan Centres	Province/Communities

EXHIBIT 11.2: OVERVIEW OF FUNDING POTENTIAL–PHYSICAL DEVELOPMENT COMPONENT

REGIONAL PRIORITY		PHYSICAL DEVELOPMENT REQUIREMENT	POTENTIAL FUNDING SOURCE
1.0	**DESTINATION DEVELOPMENT**		
1.1	**Frontcountry**		
1.1	Rossland/Red Mtn.	Resort/Condominiums Water Sewer	Private Sector Joint funding by developer, Rossland, Go B.C.
1.1.2	Nelson Waterfront	Water's Edge Project Tramway Major Boat Tour	Financing in process Joint funding by Town of Nelson, Province Private Sector/Gov't programs
1.1.3	Kootenay Lake/ Creston area	Interpretive Sites/Facilities Recreation Site development Water-based Tours Accommodation Development Signage	Province Province/communities Private Sector Private Sector Province/Communities
1.1.4	Kimberley/Fernie/ Resort Areas	Resort Upgrading Ancillary Facility Development	Private Sector Province/Communities
1.2	**Backcountry**		
1.2.1	Package Industry Development	–	Ministry of Tourism
1.2.2	Backcountry Theme Tour (Jumbo Pass/St. Mary Road)	Interpretive Facilities/Sites Road Development Signage	Province Province/Communities Province/Communities

In the case of the Columbia River System, funding support should be sought from the utilities relative to the interpretation centre and site development (interpretative and recreation sites). For the Native History/Culture interpretation product, there may be funding potential from the federal government, over and above funding required from the province and heritage programs. Funding possibilities here include Indian and Northern Affairs, Western Diversification (given the international potential of the pre-history sites) and Private Foundations.

11.3 Private Sector Financing

The public sector component of the regional tourism development priorities is ultimately intended to diversify the region's economy and strengthen the economic contribution of the tourism sector. As such it provides a more positive environment and serves to reduce the risk for private sector investment in products like:

- tour packages;
- backcountry experience packages;
- recreation products (e.g., ski/golf);
- tourism infrastructure (e.g. accommodation facilities).

Historically, tourism projects, particularly in areas outside urbanized population centres, have been notoriously difficult to finance. Private financial institutions and their policies have been identified time and time again as constraints to tourism projects in regions throughout British Columbia.

To assist the private sector to pursue their investment in accordance with regional tourism priorities, actions should be pursued to encourage a more receptive environment on the part of Private Financial Institutions. Techniques which have been used in other sectors where financing has traditionally been a problem (e.g. aquaculture) include:

- holding workshops on the financial structure and revenue potential of tourism businesses;
- holding meetings with local and regional bank managers to present the industry potential, the role of the public sector in upgrading infrastructure and support facilities to reduce the risk of private sector investment, and the proposed strategy or plan.

For example, the Action Committee could call a meeting of the region's bank managers to present this tourism development opportunity strategy and the role of the public sector as a "partner" in tourism industry development. The workshops are more oriented to loan officers and particular emphasis here should be

placed on the typical financial structure of such businesses as backcountry packages and tour operators.

Enhancing Private Sector Expertise

A common shortfall in financing on the part of operators is the lack of expertise in assembling sound business plans. There is already an extensive network of support programs which can be deployed to assist existing and potential operators in this regard. These range from the Ministry of Tourism's Development Handbook to FBDB courses. While readily available in the Lower Mainland, it is usually more difficult for operators in other regions of British Columbia to identify appropriate program support in this area. Here it is suggested that the Action Committee contact appropriate government agencies to determine how best to inform the tourism industry of programs for business plan preparation and which are currently available in the region. An information pamphlet including contacts should be prepared for distribution to the existing tourism industry and advertised as available to prospective investors.

Funding Assistance Programs

One of the major difficulties for private sector operators involves assembling sufficient equity to enable financing of any specific projects. Government funding assistance programs are designed to specifically address this area in the form of support such as low cost loans. One instrument specifically oriented to the tourism industry has been the Tourism Development Agreement program. Here, however, the financing approach was derived from an objective to create strong, world class destinations. It is not oriented to, nor available to, small tourism operators typical of the tourism industry (particularly in regions outside British Columbia's Lower Mainland). With the expiry of the Tourism Development Agreement in March, 1990, it is suggested that the Action Committee undertake appropriate consultations with the Ministry of Tourism to identify the potential for new funding assistance programs for the tourism industry which are based on the needs of smaller operators as are found in the Kootenay region. In keeping with the spirit of designation of the Kootenay region as a pilot program for ongoing regional tourism development, it may be useful to use this region as a case study for the design of such a financing program. For example (and as with any funding assistance program) there must be clear objectives from which eligibility criteria are derived. In the case of Kootenay region, these can be established from the objectives and priorities identified in this strategy. General areas of emphasis on that basis would include:

- Destination Resort Development;
- Upgrading and/or developing new high quality small accommodation;
- Backcountry package and tour development projects.

A supplementary area to address is the provision of information to the tourism industry on existing provincial government assistance programs relevant to the tourism industry (e.g., loan guarantees). Here the emphasis

is on informing the industry and providing a coordinating role for interested operators to assist them in making contact with appropriate representatives for these programs.

11.4 Support Initiatives

There are several support activities which should be considered for the pilot program, these are described below.

Package/Tour Development

References are made throughout the description of the regional priority opportunities in Section 9.0 to programs which would assist the industry with development of backcountry packages and theme tour products. What is recommended in generic terms, is a specific program directed to increasing industries' understanding of the potential in this area, and provision of information and techniques which can help industry to respond to this potential with new product development and creation of new tourism products. This is not judged to be an onerous task in that it involves some refocusing of existing programs consistent with the direction and context provided by this regional tourism development strategy. Activities within such a program could include:

- preparation of background information on:
  - destination markets;
  - the structure of typical backcountry or theme tour package businesses as linkages to wholesalers;
  - marketing techniques;
  - product development and pricing/positioning strategies;
- workshops on using background documents as information tools for the tourism industry in the region
- presentations by wholesalers to the region's tourism industry.

While there are several different regional priority opportunities to which this support program applies, it is suggested that the general focus be twofold; backcountry experiences, and theme tour packages which can be structured in association with existing accommodation facilities and tend to be shorter in duration (e.g. 1/2 day to 4 days).

Marketing Focus

The delivery of marketing assistance by the Ministry of Tourism is primarily conducted on two general levels, the marketing of British Columbia through promotion and information tools (e.g., the Accommodation Guide), and assistance through the Partners in Tourism program. With the introduction of regional tourism development approaches such as is proposed in this strategy, supplementary program support efforts in the marketing area also need to be considered. For example, reference has been made to the development of focused marketing plans for areas such as the Kootenay Lake, Rossland Red Mountain, and Kimberley/Fernie resort opportunities. Expertise and related support from the Ministry of Tourism can be structured on a project by project basis for these. Again, this is not intended, nor does it need to be an onerous and new activity. Rather it can be designed as a series of small projects where marketing specialists would work with relevant tourism operators specific to each opportunity to assist in the development of marketing plans.

Community Tourism Development Support

There is already a mechanism in place to assist communities with the identification of local tourism development opportunities and strategies to implement these. There is a need to coordinate between the Ministry of Tourism program and the regional tourism development process proposed in this report. This is particularly important in areas where the regional priority opportunities can serve to draw additional visitors to community attractions or tourism products in the vicinity of the priority. For example, strengthening the Rossland/Red Mountain destination area will have spinoff benefits for nearby communities such as Trail, Castlegar, Grand Forks, Greenwood and Midway. Coordination with individual communities through programs such as the community strategies effort to maximize the potential offered by implementation of the regional priority is essential.

Coordination Functions with Other Government Programs

The nature of the regional development priorities identified in section 9.0 will require strong coordination with appropriate ministries in two areas in particular; heritage resource development and cultural programs. The strength of the region's heritage resources and the significant role that these can play in defining a distinct tourism product makes it mandatory that such agencies as the Heritage Conservation Branch and the British Columbia Heritage Trust be involved in the implementation process. In the case of the Heritage Conservation Branch, it has been recommended that they sit on the Action Committee. This will help to ensure that program support opportunities (e.g., the Heritage Area Revitalization Program) can be utilized to its full effect in implementing the regional priorities. In the case of the British Columbia Heritage Trust, it is suggested that a designated representative work with the Action Committee on implementation of those

regional priorities with a heritage theme. There are presently no specific mechanisms for coordination with cultural support programs of the Ministry of Municipal Affairs, Recreation and Culture. Contact must be made with appropriate ministry representatives to identify the most effective mechanism for their involvement.

Participation in Land Use Planning

Participation by the Action Committee in land use planning in the Kootenay Region is important for a number of reasons:

- to ensure that the tourism development opportunities strategy is taken into consideration in land use planning decisions;
- to encourage development of backcountry package experiences consistent with the strategy and complimentary to overall government policy with respect to land use in the region;
- to ensure coordination with appropriate land use planning and approval agencies during the process of implementation (e.g. the secondary resource road theme tour, backcountry package development, the Columbia River System, and the Native History/Cultural Interpretation).

To initiate this participation, the first step of the Action Committee should be to hold a briefing session with agencies involved in land use planning on the contents of the strategy and the regional priorities selected by the Task Force on Parks, Recreation and Tourism. Participants should not only include provincial government and industry, but also Regional Districts. A specific objective of the briefing should be to develop effective consultation and information exchange agreements. For example, the Action Committee should request that they be consulted for comment on land use planning decisions which may affect the tourism development opportunities strategy. Also the Action Committee should maintain contact with the Kootenay Region Natural Resource Task Force on Parks to ensure there is a coordinated effort towards a land use planning process.

11.5 Mobilizing for Implementation

The action steps identified for the twelve regional tourism development priorities are extensive and will require an initial detailed planning phase to ensure that the implementation process commences in a sound manner. The initial mobilization activities for the Action Committee are recommended as described below.

1. Development of a Coordinating and Consultation Strategy

The Action Committee must first review the action steps and potential funding for each of the regional tourism development priorities to clearly identify the roles of member ministries and to determine the appropriate process and timing for:

- establishing the implementation committee;
- consulting with communities;
- consulting with the tourism industry.

2. Establishment the Implementation Committee

Using this report as a starting point, the Action Committee must meet with appropriate provincial ministries -- the purpose of which is to establish the Implementation Committee. The first task is to identify roles and responsibilities, review the funding potential, and establish communication procedures.

3. Development a Detailed Workplan

The results of steps 1 and 2 above will provide the basis for development of a detailed workplan by the Action Committee. The workplan should include not only scheduling and performance targets for the Action Committee but also a statement of the roles and responsibilities for the Implementation Committee as determined in step 2 above.

ANNEX 1

PROVINCIAL PARK ATTENDANCE AND FACILITY STATISTICS

Provincial Park Attendance - Campground and Day Use

West Kootenay	Campground	Day Use
Beaver Creek	260	8,900
Boundary Creek	601	9,086
Champion Lakes	2,644	13,734
Christina Lake		22,444
Conkle Lake	984	741
Erie Creek		
Jewel Lake		
Johnstone Creek	919	5,438
Kettle River	3,464	7,809
King George IV		4,174
Nancy Greene		12,067
Nancy Greene		
Ole Johnson	303	
Rock Creek		
Stagleap		14,373
Syringa Creek	3,599	30,366
Texas Point	1,159	16,282
Appledale		
Arrowlakes	286	11,338
Burton	286	4,118
Eagle Creek		5,048
Feuquier		2,172
Shelter Bay		
Brilliant Terrace		
Cody Caves		627
Drewry Point	83	
Fry Creek Canyon	35	142
Grohman Narrows		13,758
Inonoklin		
Kokanee Creek	8,467	48,933
Redfish		
Sandspit		
Kokanee Glacier	945	3,297
Kokanee Glacier Rec Area		
Kootenay Lake	340	3,689
Campbell Bay		
Coffee Creek		1,332
Kaslo Bay	221	2,357
Midge Creek	119	
Kootenay Lake Rec Area	1,242	3,781
Davis Creek	507	1,395
Lost Ledge	735	2,386
Lardeau		
Lockhart Beach	1,015	7,414
McDonald Creek	610	3,161
Nakusp Hotsprings		
Pilot Bay	245	
Purcell (West)	30	27
Roseberry	1,535	5,328
Summit Lake		
Trout Lake	801	806
Valhalla		1,545
Total	31,435	268,068

Provincial Park Attendance - Campground and Day Use

East Kootenay	Campground	Day Use
Jimsmith Lake	1,708	32,563
Lazy Lake		
Moyie Lake	6,594	29,197
Premier Lake	3,885	3,270
Ryan		
Wasa Lake	6,898	34,313
Yahk	1,932	6,730
Akamina-Kishinena Rec Area	188	1,114
Crowsnest		6,893
Elk Lakes Rec Area		13
Elk Lakes	1,385	222
Elk Valley		
Elko		
Kikomun Creek	6,825	28,882
Morrissey		
Mount Fernie	2,186	9,882
Norbury Lake	1,788	7,743
Wardner		
Athalmer Beach		33,920
Bugaboo Alpine		
Bugaboo Glacier	683	221
Burgess and James Gadsen		
Canal Flats		5,807
Columbia Lake		
Dry Gulch	1,903	6,243
Hamber	212	6
Marl Creek		
Mount Assiniboine	2,966	15,047
Purcell (East)		
St. Mary's Alpine		
Thunder Hill	1,039	3,009
Top of the World	338	322
Whiteswan Lake	5,038	1,570
Windermere Lake		2,003
Total	45,568	228,970

PROVINCIAL PARK FACILITIES

(on following pages)

Legend

Campsite – single, double and undeveloped sites
Developed Beach – length of developed beach in metres
Trails – hiking – length of trails in kilometres
– ski tour – length of trails in kilometres
Nature Programs – count of Nature Program displays, ampitheatres and nature houses

Provincial Park Facilities

West Kootenay	Area	Campsite	Sani. Stn.	Overnite Shelters	Parking Day Use/Capacity		Parking Boat Launch/Capacity		Developed Beach	Trails Hike	Trails Ski Tour	Nature Programs
Beaver Creek	44	15	0	-	1/	24	1/	7	0	0	-	0
Boundary Creek	2	18	0	-	0/	-	0/	-	0	0	-	0
Champion Lakes	1,425	89	1	1	1/	180	1/	25	475	8	-	1
Christina Lake	8	0	0	-	4/	220	0/	-	305	0	-	0
Conkle Lake	587	26	0	-	1/	24	0/	-	110	4	-	0
Erie Creek	15	0	0	-	0/	0	0/	-	0	0	-	0
Jewel Lake	49	6	-	-	1/	-	-/	-	-	-	-	-
Johnstone Creek	38	16	0	-	0/	-	0/	-	0	1	-	0
Kettle River	179	55	-	-	1/	25	-/	-	40	2	2	1
King George IV	162	3	0	-	1/	30	0/	-	0	0	-	0
Nancy Greene	198	0	0	1	1/	50	0/	-	91	5	5	0
Nancy Greene	8,088	0	-	4	-/	-	-/	-	-	19	20	-
Ole Johnson	15	10	-	-	-/	-	-/	-	200	-	-	-
Rock Creek	2	6	-	-	-/	-	-/	-	-	-	-	-
Stagleap	1,133	0	0	1	2/	30	0/	-	0	1	4	1
Syringa Creek	226	60	1	-	2/	220	1/	80	335	5	-	3
Texas Point	112	16	0	-	1/	20	2/	80	200	2	-	-
Appledale	5	0	-	-	2/	50	-/	-	-	-	-	-
Arrowlakes	93	0	-	-	-/	-	-/	-	-	-	-	-
Burton	18	0	-	-	-/	-	1/	20	30	-	-	-
Eagle Creek	38	0	-	-	-/	-	1/	20	-	-	-	-
Fauquier	16	0	-	-	-/	-	1/	20	-	-	-	-
Shelter Bay	21	0	-	-	-/	-	-/	-	-	-	-	-
Brilliant Terrace	116	0	-	-	-/	-	-/	-	-	-	-	-
Cody Caves	63	0	-	-	1/	10	-/	-	-	1	-	1
Drewry Point	21	2	0	-	0/	-	0/	-	30	0	-	0
Fry Creek Canyon	550	1	-	-	-/	-	-/	-	-	10	-	-
Grohman Narrows	10	0	-	-	1/	15	-/	-	-	1	1	-
Inonaklin	12	0	-	-	-/	-	-/	-	-	-	-	-
Kokanee Creek	280	0	-	-	-/	-	-/	-	-	-	-	-
Redfish		29	-	1	2/	50	-/	-	300	1	-	-
Sandspit		93	1	-	5/	350	1/	40	1,100	3	3	2
Kokanee Glacier	24,782	5	0	4	3/	70	0/	-	0	105	-	1
Kokanee Glacier Rec Area	7,375	0	-	-	-/	-	-/	-	-	8	-	-
Kootenay Lake	302	0	-	-	-/	-	-/	-	-	-	-	-
Campbell Bay	25	0	-	-	-/	-	-/	-	-	-	-	-
Coffee Creek	52	4	-	-	-/	-	-/	-	-	-	-	-
Kaslo Bay	2	0	-	-	-/	-	1/	20	-	-	-	-
Midge Creek	223	6	-	-	-/	-	-/	-	1,150	-	-	-
Kootenay Lake Rec Area	43	0	-	-	-/	-	-/	-	-	-	-	-
Davis Creek	5	10	-	-	-/	-	-/	-	80	-	-	-
Lost Ledge	38	10	-	-	-/	-	-/	-	50	-	-	-
Lardeau	12	0	-	-	-/	-	-/	-	-	-	-	-
Lockhart Beach	3	13	0	-	-/	-	0/	-	305	0	-	0
McDonald Creek	468	10	-	-	1/	12	1/	50	800	-	-	-
Nakusp Hotsprings	70	0	-	-	1/	24	0/	-	0	1	-	0
Pilot Bay	347	6	0	-	-/	-	0/	-	50	3	-	0
Purcell (West)	58,782	6	-	-	0/	-	-/	-	-	30	-	-
Roseberry	32	36	0	-	0/	-	0/	-	0	0	-	0
Summit Lake	6	36	1	-	1/	80	-/	-	90	-	-	-
Trout Lake	319	6	0	-	1/	25	0/	-	-	0	-	0
Valhalla	49,600	16	-	8	-/	-	-/	-	650	88	-	-
Total	135,967	609	4	20	34/	1499	11/	382	6,391	298	35	10

Provincial Park Facilities

East Kootenay	Area	Campsite	Sani Stn	Overnite Shelters	Parking Day Use/Capacity		Parking Boat Launch/Capacity		Developed Beach	Trails Hike	Trails Ski Tour	Nature Programs
Jimsmith Lake	12	29	0	-	1/	58	1/	18	126	0	-	0
Lazy Lake	24	0	-	-	-/	-	-/	-	-	-	-	-
Moyie Lake	90	104	1	-	2/	90	1/	70	335	1	-	1
Premier Lake	662	57	0	-	0/	0	1/	30	152	1	-	1
Ryan	58	0	-	-	-/	-	-/	-	-	-	-	-
Wasa Lake	144	104	1	-	4/	500	1/	20	1,280	2	-	2
Yahk	9	25	0	0	1/	30	0/	-	-	0	-	0
Akamina-Kishinena Rec A	10,915	18	-	-	-/	-	-/	-	-	-	16	-
Crowsnest	46	0	-	-	2/	107	-/	-	-	-	-	-
Elk Lakes Rec Area	11,620	10	-	-	-/	-	-/	-	-	-	-	-
Elk Lakes	5,625	20	-	-	1/	20	-/	-	-	-	-	-
Elk Valley	81	0	-	-	-/	-	-/	-	-	-	-	-
Elko	22	0	-	-	-/	-	-/	-	2,023	-	-	-
Kikomun Creek	682	104	1	-	5/	596	1/	60	0	2	-	2
Morrissey	5	0	0	-	1/	38	0/	-	0	0	-	0
Mount Fernie	259	38	0	-	1/	44	0/	0	183	0	-	0
Norbury Lake	97	46	0	-	1/	110	1/	11	92	0	-	0
Wardner	4	0	-	-	1/	20	-/	-	-	-	-	-
Athalmer Beach	14	0	-	-	3/	82	-/	-	360	-	-	-
Bugaboo Alpine	24,912	6	-	1	-/	-	-/	-	-	-	-	-
Bugaboo Glacier	362	12	0	1	1/	30	0/	0	0	0	-	0
Burgess and James Gadsen	352	0	-	-	-/	-	-/	-	-	-	-	-
Canal Flats	8	0	-	-	1/	64	1/	34	125	-	-	-
Columbia Lake	260	0	-	-	-/	-	-/	-	-	-	-	-
Dry Gulch	29	26	0	-	0/	-	0/	-	0	0	-	0
Hamber	24,518	10	-	0	-/	-	-/	-	-	-	-	-
Mari Creek	167	0	-	-	-/	-	-/	-	-	-	-	-
Mount Assiniboine	39,052	75	0	20	0/	-	0/	-	0	0	-	0
Purcell (East)	72,741	0	-	-	-/	-	-/	-	-	-	-	-
St. Mary's Alpine	9,146	0	-	-	-/	-	-/	-	-	-	-	-
Thunder Hill	44	25	0	-	0/	-	0/	-	0	0	-	0
Top of the World	8,791	28	-	2	1/	20	-/	-	-	-	6	-
Whiteswan Lake	1,994	107	-	-	2/	15	6/	40	-	-	-	-
Windermere Lake	220	0	-	-	-/	-	-/	-	-	-	-	-
Total	212,963	644	3	24	28/	1824	13/	283	4,676	6	22	6

ANNEX 2

KOOTENAY DEVELOPMENT REGION

SUMMARY OF

PUBLIC INPUT ON TOURISM OPPORTUNITIES

FROM OPEN HOUSES

INFORMATION

Open houses were held February 12-15 and February 19-21. They were held in Invermere, Kimberley, Fernie, Creston, Grand Forks, Rossland and Nelson. From 4-7PM a forum was conducted where the public were given the opportunity to view the panels, read the handout and ask questions on a one to one basis. Between 7-8pm a small presentation was made and the floor was open to questions.

A questionnaire was distributed at the open houses addressing these questions:

1. Please list any significant tourism development opportunities in the region which are not included in the Panels?

2. What types of tourism development should be emphasized in the region (e.g., more attractions, more backcountry access by tourists, heritage tours, resorts, golf, etc.)?

3. What constraints do you think are holding back the development and growth of tourism within the Kootenay Region? Please list.

4. What is your impression of the preliminary tourism strategy?

   Do you generally agree with it?

   Do you have any comments or recommended changes?

This represents a summary of responses to the first three questions. The responses on the tourism strategy are reported on in the presentation notes.

QUESTION 1 – IDEAS FOR TOURISM DEVELOPMENT

INTRODUCTION

These suggestions for tourism development are primarily local in nature. There are 158 ideas listed. Many were suggested by more than one individual.

LOCAL TOURISM DEVELOPMENT SUGGESTIONS

Invermere – Open House

- Historic walk-Invermere
- Site of David Thompsons first camp and winter home
- St. Marks Church
- St. Peters Church Windermere
- Buildings at museums
- Local Churches, Historic Trails
- Local History, Industrial Heritage
- Local Architecture
- Quality campground closer to Invermere
- Development of a Convention Centre
- Local walking, driving tours
- Columbia Marshes
- Second Ski Hill in Golden at Junction of Beaverfoot Forestry Road & Trans Canada
- Canoeing on the Columbia
- A waterfowl and wetlands interpretive park in the Columbia River lowlands
- Radium Hot Springs higher quality overnight accommodation, better use and development of the hot springs

Kimberley – Open House

- Theatre entertainment opportunities (all season) involving the summer "Wildlife Theatre" productions at Fort Steele, and winter and summer theatre at Cranbrook. This would be in conjunction with the college (dramatic arts program) and existing community groups (professional & recreational).
- Culture - theatre program i.e. Cranbrook Theatre & Auditorium, Art Gallery
- Restoration and movement of the Marysville School to a site by the Mark Creek Bridge
- Winter tours at Kimberley
- Moyie townsite

•St. Eugene Mission

•Ferry trips on Kootenay Lake & Arrow Lake

•Winterfest in Kimberley not mentioned

•Cominco Gardens should be kept up

•Indian Mission out of Cranbrook (St. Eugene)

•Extension of the Bavarian mining Railway to connect up the downtown with the Ski Hill. This being a novelty ride, would interest people to ride the train and would enhance the economy of the downtown in the winter and the ski hill in the summer.

•A mining museum in Kimberley utilizing the Sullivan Mine Entrance and buildings at the 3900 level. This is a very historic site since it was the world's largest lead and zinc mine. Include an underground experience

•Marketing & promotion of the Wildlife Sanctum. It is a jewel in the crown of the whole area in respect to recreation for tourists and completes a well conceived plan including skiing, golfing and camping. In other words, something for everyone's taste.

•During the summer Volkmarches are held in the Wildlife sanctum. In 1987 - 175 people, 1988 - 140 people, 1989 - 189 people.

•The Wildlife Sanctum is within the city limits, if the city were to acquire it, it would become the largest municipal park in the world. This would certainly benefit the whole area and would have spinoff bonuses for the whole of the East Kootenays

•Development of Confederation Park; downtown revite; highways/trees projects; wildlife museums; demo forest; heritage tours; St. Eugene Mission; expansion of festivals and sports tournaments, entertainment events and snowmobiling trails

•Development of the entertainment industry with Cranbrook's new theatre proposal combined with Fort Steele

•Snowmobiling should be explored and promoted more in our area

•Develop an interpretive mining centre in Kimberley

•Mine museum at the Old Sullivan Mine Entrance

•A much more "unique" theme: e.g., Bavarian City of Clocks rather than just a Bavarian city engine. Much more needs to be done to attract our youth.

•Maintain small town Bavarian concept

•Wildlife Sanctum - largest municipal park in the world - tours, treks, Wildlife viewing

•Develop Confederation Park & Art Gallery

Fernie – Open House

•Could have substantial heritage and natural attractions - Old growth cedars on Island Lake Rd.

•Heritage Theme - Morrissey & Coal Creek sites need to be recognized/protected.

•Mining - development Hosmer mine site

- mining museum

•Expanded mural project - 3 in place to date

•First class hotel/motel

•Sports camps and seminars

•Downtown revitalization

•Develop Fernie as a four season destination

•Accommodation at Fernie Snow Valley

•Develop Fernie's heritage buildings on 2nd avenue via downtown revitalization

•Marketing - Rec. Centre

•Promote Elk Lakes Park

Creston – Open House

•A tour through the brewery

•Close in and heat our swimming pool and install water slides

•Goat River Hydro-Electric generation plant

•Development of bypass to give an opportunity to get away from heavy traffic hassle and enjoy the serenity of this lovely town

•A small marina on Kootenay River

•A mountain top restaurant (Mt. Thompson) accessible by road with campsite and hiking trails at top

•Marina at Kuskanook

Grand Forks – Open House

•Year round resort

•Jewel Lake Resort nine kilometre north off highway 3

•Cross country skiing

•Granby Smelter Story should be emphasized

•Cascade dam site

•Ghost towns

•Restore Cascade Power House

•Boundary Historical Society could use some encouragement or professional help

•Deadwood Motherlode mining ruins

•Smelters

- Smelter ruins in Greenwood & Bundary Falls
- Slag piles and smelter ruins

•Greenwood museum

•Smelter Lake Redevelopment

•Fruitova School could be a living craft village

•Refurbish Doukhobor Village & build museum in Sleepy Hollow

•Rebuild Heritage Heights and make it into a museum

•Development of a park, beach, & marina on the property purchased by the Parks Branch in 1989 and located on Hwy 3 at Christina Lake

•Development of Cross Country Ski areas close to the community of Christina Lake

•Museums

•Camping grounds - public/private

•Annual rodeo

•Annual softball tournament

•Annual arena hockey tournaments, curling bonspells

•Annual car rally

•Annual mini marathon

•Larger museum at Midway

•Develop local riverside park (camping area)

•Tourist Info Centre

•Utilize the Tourist Resource at Grand Coulee Dam

•More recreational facilities within our city e.g. Waterslide, mini-golf, Par 3

•Restore Cascade power plant

•Doukhobor Village Restoration

•Fruitova as a destination point to visit the area

•Develop Smelter Lake

Rossland – Open House

•Sasquatch Industry

•Emphasize cross country ski races

•High level cross country ski races

•Retail facilities

•More accommodation and restaurants

•An information centre

•Change the image of a smelter community

•Capture all the traffic's interests

•Emphasize this as Canada's only Alpine City

•Downhill and cross country skiing and museum have a good start - improve promotion and facilities

Nelson – Open House

•Summer repertory theatres in Nelson (3 were run last year)

•Development of the park areas

•Picnic areas along scenic section

•Information Centres

•Canoeing

•Museum(s)

•Heritage Buildings

•IMAX type movie

•More country inn style accommodation

•Sites - Sandon, Cody Caves, Marblehead Quarry
- Archaelogical sites, Valican, South Slocan

•Preserve historic sites and potential park sites in Lardeau - Duncan Valley

•Ghost towns

•Use Selkirk College for:
- hold workshops on heritage
- historical boat restoration course

•Boat cruises on Kootenay Lake

•Encourage more film making in area

•Beautification of water front

Mail Ins

•Develop a region museum in Castlegar to show the history of power generation in the Kootenay's in conjunction with B.C. Hydro

•Develop "host city's" geographic location offers ability to lure visitors into the Kootenay region

•Develop small convention centre concept

•Re-zone Oatishenia "strip" for commercial development

•Railway museum

•Development of Confederation Park; downtown revite

•Highways/trees project

•Wildlife museum

•Demo forest

•St. Eugene Mission

•Entertainment events and snowmobiling trails

•Continued improvements to Syringa Creek Park

•Continued improvements and extensive publicity to Zuckerberg Island Park

•Further support for and development of the circular walking trail concept

•Promote Verigin's Tomb and the Doukhobor Cultural Centre

•Development of entertainment i.e., theatre

•Develop a R.V. Park in Castlegar on the Columbia River jointly funded with the government

•Development of Eremenko's Park

•Develop Confederation Park

•Restore Sandon

• Expand hiking trails in the Haystack area, Summit Creek Corridor, Summit area, and Selkirk Mountains (from Stagleap Park to Nelson)

• Packagae and promote circle tours

• Visitor reception at the S.S. Moyie

• Development of Kaslo as a heritage village

• Backcountry access and opportunities to provide guided trips and adventures

• Restore sorts fisheries

• Conserve heritage sites

• Archaeological sites i.e. Vallican, South Slocan

• Tourist destinations for: Hot Springs, Marblehead Quarry, Cody Caves, River Rafting, Cat and Heli Skiing, Sandon, Bicycle tours, Hotels and bus tours

• Promote Sasquatch

- Lights on cross country trails at the Nelson Nordic ski area
- A winter oriented nature interpretation program
- A mountain top experience to Thompson Mountain
- Develop a small fish farm where people and children can fish for a fee
- Construct an executive or par-3 golf course in the campground area
- Develop a Nature Information Centre with adjacent guided or self-guided nature walks and hiking trails
- Construct an Aquatic Centre
- Increase the snow making capability and the number of lifts at the Kimberley Ski and Summer Resort
- Restore the original lake near the Dawnview housing development to create a water fowl sanctuary or a children's swimming area.
- Create a small lake near the downtown area by damming Mark Creek
- Construct a bridge across the canyon at the Marysville Falls viewpoint
- Produce a stage show which would be shown daily during the peak visitor periods
- Have an Outdoor Recreation Council of B.C. map of the Kimberley area produced
- Establish Kimberley as the Gateway to the St. Mary Alpine Park and the Purcell Wilderness
- Expand and upgrade the Kimberley Cross Country Ski trails and facilities
- Establish a rafting experience on the St. Marys River
- Expand the present indoor tennis/racquet centre
- Expand the existing Heritage Musuem

Question 2 – Development to be Emphasized
Open House Questionnaire Results
Kootenay Development Region

— No. of Mentions — Total	Selected Items	Development to be Emphasized
78	58	Destination Related Opportunities
		- outdoor activities (golfing, skiing, cycling, snowmobiling)
	19	- destination resorts
56		Backcountry Opportunities
	21	- hiking/wildlife viewing
	18	- access
	10	- self guided and guided tours
	4	- hunting/fishing
	2	- horse trails
40		Heritage Resources
	11	- tours
	4	- museums
	3	- support major attractions already developed
	1	- ghost towns
25		Services and Facilities
	20	- infrastructure (signage, information system, human resource training and transportation access)
	5	- general services
21		Natural Resources
	9	- Lakeshore
	3	- scenic beauty
	2	- parks
	1	- five dams
	1	- hotsprings
20		General
	8	- programming focussing on a longer season
	4	- give existing attractions priority
	3	- small scale, high quality
	3	- emphasize a variety for all ages
	2	- quality that compliments town
16		Circle Tours
5		Increase Attractions
2		Railway Tours
1		Cultural Tours

Note: Selected sections are of specific points made and therefore do not necessarily equal total.

Question 3 – Constaints to Tourism
Open House Questionnaire Results
Kootenay Development Region

— No. of Mentions — Total	Selected Items	Constraints
42		Poor road and air access
	11	- completion and expansion of airports
	5	- connector and access roads
	3	- completion and improvement of highways
	1	- bike routes and roadside rest areas
	1	- increased ferry service (Gallina Bay and Needles)
40		Lack of Facilities and Quality Services
	11	- general tourist facilities
	7	- tourist information centres
	5	- hotels
	5	- shopping
	4	- quality resorts
	3	- restaurants
	3	- general services
25		Lack of coherent planning and cooperation between communities
	10	- need coherent planning
	8	- need public knowledge, support and unity
	3	- lack of tourist information
	2	- competitiveness, rather than cooperation, between communities
22		Lack of funding
	3	- no startup money
	1	- lack of small business training
	1	- volunteer cultural organization not promoted
18		Need for better signage
	6	- at major stops
	1	- old signs improved
15		Shortage of trained labour
	3	- need for training
	3	- need for leadership
	1	- need government support
	1	- need for volunteers
13		Resource use Conflicts
	6	- need integrated resource assessment so issues can be managed cooperatively

---No. of Mentions Table	Selected Items	Constraints
	1	- enhance fisheries
	1	- need better water management
	1	- water levels hinderance (Arrow Lakes)
8		Need for downtown revitalization
	1	- clean up
	1	- more parking
	1	- coordinated building theme
7		Lack of recognition and support by provincial government
5		General
	3	- location
	1	- poor economy
	1	- weather
4		Lack of attractions and cohesive destination theme
3		Poorly developed water fronts
	1	- need for facilities
	1	- inappropriate area for industrial development
3		High costs
	1	- liability costs
	1	- gasoline
	1	- price of accommodations

Note: Selected sections are of specific points made and therefore do not necessarily equal total.

ANNEX 3

KOOTENAY DEVELOPMENT REGION

REGIONAL OPPORTUNITIES

EVALUATION

KOOTENAY DEVELOPMENT REGION
REGIONAL TOURISM DEVELOPMENT OPPORTUNITIES

1.0 DESTINATION DEVELOPMENT

1.1 Front Country

Emphasis: Enhance and build on existing strengths. Improve quality of accommodation

1.1.1 Kootenay Lake/Creston area

- improve recreation facilities
- encourage small quality inns/resorts
- boat touring
- enhance interpretation facilities

1.1.2 Nelson Waterfront Development

- marina/hotel/waterfront public access

1.1.3 Rossland/Red Mountain

- develop strong base facilities
- resort/condominium units
- strong summer diversification
- package development

1.1.4 Windermere Valley

- enhance destination area with more water-based recreation activities/public assess

1.1.5 Hot Springs Development

- encourage development of undeveloped sites as attractions with ancillary resorts where appropriate (e.g., Halcyon)
- encourage ancillary supporting development for existing facilities

1.1.6 Upgrade Resort Accommodation - Kimberley/Fernie

- summer activity diversification
- strengthen family market orientation

1.1.7 Ski/Golf Product

- establish new markets
- upgrade existing product
- design/implement support program

1.2 Backcountry

Emphasis: Backcountry package experiences

1.2.1 Education/Training/Marketing Seminar program for back country package development and linkage approachs to front country development. Encourage/participate in resolution of backcountry policy. Investigate funding program potential for backcountry products.

2.0 HERITAGE ATTRACTIONS

Emphasis: Build on existing strengths/improve and upgrade regional attractions

2.1 Fort Steele

2.2 Cranbrook Railway Museum

2.3 Sandon/New Denver/Silverton

2.4 Rossland Mining Museum

3.0 TOURING DEVELOPMENT

Emphasis: Developing touring experiences capable of drawing visitors to region and linking communities/attractions/theme areas

3.1 General Information Improvements

- Prepare and implement integrated signage focussing on communities
- Develop tourist information centres
- Border crossing hospitality and information improvements
- Gateway signage program

3.2 Heritage Theme Tours (Rubber-Tire)

Emphasis: Strong interpretation content with regional heritage attraction as "anchor".

3.2.1 Kaslo/Sandon Area

- Highways 31, 31A, 6, 3A
- Highways 31, 23, 31A
- Ghost town and related themes

3.2.2 Community Heritage

- Nelson, Castlegar, Trail, Rossland, Grand Forks, Greenwood ,

3.2.3 Mining Themes

- Kimberley, Fernie, Cranbrook, Elk Valley, Crowsnest Pass
- Grand Forks, Greenwood, Rossland, Trail area

3.3 Circle Tours (Rubber Tire)

Emphasis: Regional diversity and breathtaking scenery

3.3.1 Highway 3/93 from Alberta/U.S.

3.3.2 Backcountry Themes (summer roads)

- St. Mary and Jumbo Pass/Lardeau Valley area

3.4 Rail Excursions

Emphasis: High end regional draws

3.4.1 Cranbook/Kimberley/Fort Steele

- Excursion/heritage

3.4.2 Burlington Northern

- Excursion

3.4.3 Nelson - Creston

- Scenic lakeside tour

3.4.4 Kettle Valley

- Scenic tour

3.5 Inter-Regional Linkage Tours

Emphasis: Inter-regional co-operation and co-ordination

3.5.1 Sparwood/Elk Valley/Alberta

3.5.2 Penticton - Kettle Valley

3.5.3 Radium - Alberta

3.5.4 Windermere Valley - Golden

3.5.5 Cranbrook - Kingsgate - Spokane

3.5.6 Grand Forks - Cascade - Colville

4.0 COLUMBIA RIVER SYSTEM

Emphasis: Interpretation of navigational history, dams, and modern day use

4.1 Site Development/Interpretation

- Access
- Tour development (water and road)
- Interpretative centre
- Ancillary recreation

5.0 NATIVE HISTORY/CULTURE INTERPRETATION (ECOMUSEUM)(SOUTH-EAST KOOTENAYS)

5.1 Site Interpretation/Development

- Alpine game drives
- Petroglyphs
- Prehistoric mines, sites

Tour Development - primarily guided tours

6.0 CULTURAL/ARTS

Emphasis: Events/experience conveying region's culture/heritage and providing activities

6.1 Festival Network

- encouraging summer festival scheduling amongst communities

6.2 Summer Arts Programs

- Community-based summer evening programs

6.3 Cultural/Artisan Centres

- Building on cultural activities 1989 study
- encouraging artisan centre or centres (retail outlets)

DESCRIPTION OF EVALUATION CRITERIA

Evaluation Methodology

The evaluation methodology involved assessing for each regional opportunity against each of the criteria described below. The scale which was used ranges from one (least consistent with criteria) to five (most consistent with criteria). To illustrate:

- score 5 - most consistent with criterion/best achieved objective
- score 3 - generally consistent, but some inconsistency in minor areas, does not fully achieve objective
- score 1 - does not contribute substantially to the criteria, does not achieve objective.

1. Consistency with Strategy

The degree to which the opportunity is consistent with the recommended tourism development strategy (that is, theme area development or touring linkages).

2. Strength of Regional Draw

The degree to which the opportunity serves as a major draw attracting visitors to the region.

3. Catalyst for Other Tourism Products

The role which the opportunity will serve as a catalyst for development of other tourism products as a result of implementation of the opportunity.

4. Increases Length of Stay

The degree to which the opportunity will increase the greater the length of stay in the region.

5. Increases Expenditures

Although increased expenditures will come from length of stay, this criterion also considers such factors as increasing the volume of "higher value" tourists.

6. Investment Costs

The less public sector investment costs initially, the greater the likelihood of immediate returns from pursuing the opportunity. Higher scores were given to opportunities with least investment cost.

The opportunities identified above were priorized according to the evaluation criteria. The results of that process are presented in the following pages.

OPPORTUNITY EVALUATION

	Consistency with Strategy	Strength of Regional Draw	Catalyst for Other Products	Increases Length of Stay	Increases Expend.	Investment Cost	Total Score	Rank within Group	Decision of Kootenay Task Force on Parks, Tourism & Recreation, March 10, 1990
1.0 DESTINATION DEVELOPMENT									
1.1 Front Country									
1.1.1. Kootenay Lake area	5	3	5	5	4	4	26	3*	Top 4 for detailed writeup
1.1.2. Nelson Waterfront Development	5	3	5	5	4	5	27	2*	
1.1.3. Rossland/Red Mountain	5	5	5	5	5	3	28	1*	
1.1.4. Windermere Valley	5	3	3	4	3	4	22	6	
1.1.5. Hot Springs Development	5	3	3	4	3	5	23	5	
1.1.6. Upgrade Resort Accommodation - Kimberley/Fernie	5	3	4	4	4	5	25	4	
1.1.7. Ski/Golf Product	5	4	3	3	3	4	22	6	
1.2 Backcountry									
1.2.1. Education/Training/Marketing Seminar program for backcountry package development. Backcountry access/funding support investigations.	5	4	3	4	4	5	25	4*	Writeup and add Backcountry Road Jumbo Pass / St. Mary (item 3.3.2)
2.0 HERITAGE ATTRACTIONS									
2.1 Fort Steele	4	3	3	3	3	4	20	2	Detailed writeup for 2.3. Combine rest as one writeup
2.2 Cranbrook Railway Museum	4	3	3	3	3	4	20	2	
2.3 Sandon / New Denver / Silverton / Kaslo	5	4	4	4	4	2	23	1*	
2.4 Rossland Mining Museum	4	3	3	3	3	4	20	2	
3.0 TOURING DEVELOPMENT									
3.1 General Information Improvements	5	3	3	3	3	3	20	3*	Detailed writeup and add 3.3.1 and all 3.5's
3.2 Heritage Theme Tours (Rubber Tire)									
3.2.1. Kaslo/Sandon Area	5	4	3	4	4	2	22	1*	Detailed writeup . 3.2.1 and 3.2.3
3.2.2. Community Heritage	5	3	3	4	3	3	21	2	
3.2.3. Mining Themes	5	4	3	4	3	3	22	1*	

	Consistency with Strategy	Strength of Regional Draw	Catalyst for Other Products	Increases Length of Stay	Increases Expend.	Investment Cost	Total Score	Rank within Group	Decision of Kootenay Task Force on Parks, Tourism & Recreation, March 10, 1990
3.3 Circle Tours (Rubber Tire)									
3.3.1. Highway 3/93 in Alberta/U.S.	5	2	2	2	2	5	18	5	— See 3.1
3.3.2. Backcountry Themes (summer roads)	5	3	3	4	3	2	20	3	— See 1.2.1
3.4 Rail Excursions									
3.4.1. Cranbrook/Kimberley/Fort Steele	4	4	4	4	4	1	21	2	Generalized writeup
3.4.2. Burlington Northern	3	3	3	3	3	2	17	6	
3.4.3. Nelson - Creston	4	4	4	4	4	2	22	1	
3.4.4. Kettle Valley	3	4	3	3	3	2	18	5	
3.5 Inter-Regional Linkage Tours									
3.5.1. Sparwood/Elk Valley/Alberta	5	2	3	3	2	4	19	4	See 3.1
3.5.2. Penticton - Kettle Valley	5	2	2	3	2	4	18	5	
3.5.3. Radium - Alberta	5	2	3	3	2	4	19	4	
3.5.4. Windermere Valley - Golden	5	2	3	3	2	4	19	4	
3.5.5. Cranbrook - Kingsgate Spokane	5	2	3	3	2	4	19	4	
3.5.6. Grand Forks - Cascade - Colville	5	2	2	3	2	4	18	5	
4.0 COLUMBIA RIVER WATERWAY									
4.1 Site Development / Interpretation	5	4	5	4	4	2	24*	1	Detailed writeup
5.0 NATIVE HISTORY/CULTURE INTERPRETATION									
5.1 Site Interpretation/Development	5	5	5	5	5	1	26*	1	Detailed writeup
6.0 CULTURAL/ARTS									
6.1 Festival Network	4	3	2	3	3	3	18	1	Combine for detailed writeup
6.2 Summer Arts Programs / Sports Programs	4	1	1	2	2	3	13	3	
6.3 Cultural/Artisan Centres	4	1	1	2	3	4	15	2	